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Getting Started – Creating a Project

Getting started is easy. When you log in for the first time, there is an onboarding slideshow tutorial. Close that out, and you’ll see the **New Project** box below:

Projects require two quick steps to start:

1. **Specify at least one location, and**
2. **Choose at least one data variable.**

By default, we choose some seed variables for you. Feel free to click on **Create Project** to begin!

Your First Map

When you create a project, SimplyAnalytics automatically creates 4 views for you. A Map, Comparison Table, Ranking Report, and Quick Report. Each view has its own use cases that you can read more about at the end. For now, look at the map and its options:
These are all dropdown boxes. Feel free to change the mapped data variable, the location, and how your location is analyzed by. For example, try changing the third dropdown to Census Tracts to view the map by a smaller geography.

The hand tool – allows you to click on the map and move around.

The zoom tool – allows you to focus and zoom in on a particular area of the map

The i-tool – allows you to click on any location in your map to view the underlying data behind it, add an alias location, add to favorites and more.

Editing the map legend allows you to change the classification method, category ranges, color scheme and more.

**Adding Businesses to Your Map**

SimplyAnalytics allows you to add businesses onto your map using business information from D&B.

There are 3 ways to add businesses – this guide will focus on two of them.

Click on the Businesses block towards the top-left of the screen to begin, while still in the Map view.

**The Keyword Search Functionality**

This is the quickest & easiest way to add businesses to a map. This allows you to enter in a keyword such as, “coffee” or a business name such as “Starbucks”. SimplyAnalytics will then add in all related businesses to the map.
Browse by Business Categories

② This feature enables users to run a business query based on a NAICS or SIC Code.

NAICS/SIC codes are industry codes utilized in North America to categorize businesses. Every business has both a NAICS & SIC code so, there's codes for Mexican restaurants, hair salons, and more! NAICS Codes are 6 digits long, and SIC codes are 8. SIC Codes go one step further in specificity.

Click on Browse Business Categories

This will open the NAICS/SIC panel.

Click on a category such as 44-Retail Trade.

This will open subcategories within Retail Trade (44), such as gas stations (4471), grocery stores (4451), clothing stores (4481) and more.

Clicking on one of the subcategories above will show the final subcategories that are available. For example, clicking on Clothing Stores (4481) will open – Men's Clothing Stores, Women's Clothing Stores, etc.
Check out the final map here mapping Women's Clothing Stores (NAICS: 448120) in Dallas, TX.

If you would like to see these mapped businesses in a spreadsheet, toggle to the Businesses report that is automatically created for you on the far-right side of your screen.

**BEFORE YOU PROCEED**

Please toggle to the Comparison Table or Ranking Report located towards the righthand side of the interface to begin adding variables to a table. You are welcome to stay in the map view, but keep in mind that you can only map one variable at a time.

How to Browse and Add Data Variables

There are 3 ways to search and browse for data variables. This section will provide a brief overview of each. Click on the Data block pictured below to begin.

First, there is the Data Search functionality. This is a great way to instantly search for a data variable. Simply type in a keyword such as, “insurance” or “rice”, press Enter, and SimplyAnalytics will return any related variables.

1. Click on a data variable from the variables list that pops up and 2. close out the panel to see the variable added to your report or map.
Browsing by Category

Browsing by Category works similar to how Amazon searching works – a faceted system. Meaning, on Amazon you would select “shoes”, then a color of shoes, brand of shoes, size, etc. Similarly, in SimplyAnalytics, you can select a broad category such as Education, and then get deeper into that category. In the image above we are looking at – Education > 

Educational Attainment > Gender Female. SimplyAnalytics will return any variables that are related to Educational Attainment for Females. Give it a try!

Browsing by Data Folder

If you do not prefer to browse data by categories, you are welcome to utilize the Data Folder browsing system. This allows you to select a dataset, then browse the folders within that dataset. Here’s how:

1. Click on Data Folder from within the Data block
2. Click on a dataset, for example: Consumer Expenditure Estimates
3. Click on a folder and subfolder. In this example, Healthcare > Health Insurance
4. Choose your variables from the folder
Exploring Reports and Charts in SimplyAnalytics

With the knowledge of how to create a project, interact with businesses, and browsing/searching for variables – you can begin to explore the other views in SimplyAnalytics. Select, New View towards the top-right of the screen. This takes you to a dashboard where you can launch any of the reports in the program.
Simply click on **Create** under one of the options, choose your locations and variables then select **Done** to generate your report. Image here for reference using a Ring Study Table.

You can repeat this process (New View, then Create) to create any report in SimplyAnalytics.

### Choosing the Right Report for your Research

Each report in SimplyAnalytics has various use cases. Check out the information below to help determine which report to use.

*Note: These can all be exported in various formats by clicking on Export towards the top-right of the page.*

**Map** – Great visual reference depicting a mapped data variable for a target location. You can also overlay business points on top. Maps can be exported as high-resolution images. For example, visualizing household income across the city.

**Comparison Table** – Think of this as building a table from scratch. You can add any type of location (ZIP Codes, Census Tracts, Cities, etc.) and any variables to compare the data. For example, comparing some spending data for your home census tract versus the ZIP Code or county.
Ranking – Allows you to analyze data for all the smaller geographic units within one larger geography and rank a variable. For example, analyzing all counties in the USA, or all of the ZIP Codes in a state, and ranking a variable, shown below.

Quick Report – A nicely formatted, easy-to-read prebuilt report that compiles a comprehensive list of key data variables for any location. Use this when you want to get a quick snapshot of the demographic makeup of some locations.
Ring Study - Select a central location and SimplyAnalytics will automatically calculate your chosen variables for a 1, 3, and 5mi radius around the location. Use this when you need to understand data surrounding a specific location.

<table>
<thead>
<tr>
<th></th>
<th>1 mile radius</th>
<th>3 mile radius</th>
<th>5 mile radius</th>
<th>All of USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>% Educational Attainment</td>
<td>21.63%</td>
<td>21.71%</td>
<td>22.17%</td>
<td>32.36%</td>
</tr>
<tr>
<td>Bachelor's degree or higher, 2021</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% Educational Attainment</td>
<td>11.20%</td>
<td>10.65%</td>
<td>10.99%</td>
<td>17.09%</td>
</tr>
<tr>
<td>by Sex</td>
<td>Females, Bachelor's degree or higher, 2021</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Healthcare</td>
<td>Health insurance, 2020</td>
<td>$81,617,748.66</td>
<td>$183,075,482.42</td>
<td>$269,349,223.02</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Healthcare</td>
<td>Health insurance (Household average), 2020</td>
<td>$4,253.25</td>
<td>$4,237.22</td>
<td>$4,225.02</td>
</tr>
</tbody>
</table>

Business Table – Provides a data table with detailed information about your business query. For example, pulling a list of all Mexican restaurants in the city. **TIP:** Click on View Actions > Columns to view more fields of data for every business.

Related Data Table - Add one data variable to this report and we will automatically add all the related data for you. For example, if you add "% Households w/Income $50,000 to $74,999" the report will also show all of the other income ranges.
Time Series Report - Add one data variable to this report and we will automatically add all years of data for that variable. For example, if you add "Total Population, 2021" the report will also show data for the years 2015, 2016, 2017 etc.

Bar Chart - Bar charts are a great way to visually compare data values across locations. Add two or more locations to the view and select the desired data variable to create your chart.

Histogram - A histogram is a chart that shows the frequency distribution of a data variable for the locations you select (e.g., median income for all counties in Texas). Each bar represents a "bin" of data with the same width as the other bars, and the height of the bar represents the count of the number of locations that have a value that falls within each bin. It's an extremely useful chart that provides a visual estimate of a variable's mean, standard deviation, skewness and kurtosis.
**Scatter Plot** - A scatter plot is a great tool for visualizing the relationship between two data variables. Select a location and a geographic unit (e.g., ZIP Codes in the USA), then select an x-axis data variable and a y-axis data variable. Each dot represents both the x and y values for a single location. The line of best fit and correlation value indicates the direction and strength of the relationship between the two variables.

**Creating a Custom Combination Location**

The Custom Combination Location feature enables users to combine locations of similar geographies to form one larger area. This is especially useful in instances where a user has an area in mind that does not match up to conventional locations – for example, “downtown” – we all know where and what that is, but it’s not exactly a single ZIP Code, but perhaps it is a few ZIP Codes combined. Another example would be creating “Texas Mexico Border Counties” where it’s not just one county, but many.

This example will create a neighborhood in Dallas, creating this from the map. You can always create a custom location while in another report, but this example will be choosing some areas on the map.

First, *use the i-tool to click on each location that makes up the target area* – the reason why you want to use the i-tool is because any selected locations will automatically be added to your "Recently Used Locations" list, and this will come in handy when creating the custom location.
After you have selected each location on the map that makes up your custom neighborhood,

① Click on the Locations Block

② Click on the “Custom Locations” text to open the custom locations options

③ Click on “Create new combination location”

This will open the Combination Location creation menu. Simply provide your custom location with a name, and select the Clock icon to add in the locations you recently selected.
Click **Save**, and your new custom location will be presented on the map. NOTE: The image below has had a location mask applied – you can do this by clicking on View Actions > Apply Location mask towards the top-right of the screen.

The great thing about custom locations is that you can use them in other reports, and SimplyAnalytics will calculate the data for you.

**Business Report for Custom Location:**

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Business Name</th>
<th>Street Address</th>
<th>City</th>
<th>State Abbreviation</th>
<th>Zip Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 BECKLEY LLC</td>
<td></td>
<td>729 N BISHOP AVE</td>
<td>DALLAS</td>
<td>TX</td>
<td>752084340</td>
</tr>
<tr>
<td>2 BREWED LTD.</td>
<td></td>
<td>111 W DAVIS ST STE 170</td>
<td>DALLAS</td>
<td>TX</td>
<td>752084455</td>
</tr>
</tbody>
</table>

**Comparison Report for Custom Location (notice the data is calculated for you):**
Creating a Custom Radius Location

A custom radius location is a great feature when you want to analyze data for a specific radius around a central point – for example, a 2.5-mile radius around a ZIP Code. Similar to the combination location – you can do this on a map or any of the reports. This example will show a map as it is easier to visualize.

1. Click on the Locations Block
2. Click on the “Custom Locations” text to open the custom locations options
3. Click on “Create new radius location”
This will open the Radius location creation prompt:

1. Specify which location will serve as the center of the radius. Feel free to enter a ZIP Code, Census Tract, address, etc.

2. Specify the size of the radius in the appropriate box

3. Click Save

Once saved, you will see your new location. Like the combination location, feel free to use this with other reports like the Comparison Table or Ranking Report:
Creating a Data Filter

Data filters are a great way to identify target areas based on some conditions. For example, suppose you want to find ZIP Codes in the USA with a population greater than 3,000 and Median HH Incomes of greater than $70,000, and the HH avg spending on Food away from Home is greater than $3,500 per year.

This example will use a Ranking Report for the USA. You are welcome to create filters on Maps as well.

① Click on the **Filtering** dropdown towards the top-right of the Ranking Report. This will open the filter creation panel.

② Choose a data variable(s) that you want to filter by...
③ Set your conditions in the available fields

④ Click on Apply to apply the filter to your Ranking Report.

There is an option in the filter panel to “Hide” or “Strikeout” locations. Choose “Hide” to remove any locations that don’t meet your filter conditions.

Final Ranking Report with Filter Applied and Hiding Filtered Locations

<table>
<thead>
<tr>
<th>Location</th>
<th>Food away from home (Household average), 2020</th>
<th>% Educational Attainment</th>
<th>Median Household Income, 2020</th>
<th># Total Population, 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 98039, Medina, WA</td>
<td>$10,201.13</td>
<td>77.78%</td>
<td>$191,867.77</td>
<td>3,361</td>
</tr>
<tr>
<td>2 90272, Pacific Palisades, CA</td>
<td>$10,076.35</td>
<td>80.15%</td>
<td>$194,062.30</td>
<td>20,754</td>
</tr>
<tr>
<td>3 94920, Belvedere Tiburon, CA</td>
<td>$9,901.49</td>
<td>77.40%</td>
<td>$171,095.29</td>
<td>12,817</td>
</tr>
<tr>
<td>4 94024, Los Altos, CA</td>
<td>$9,898.75</td>
<td>86.46%</td>
<td>$244,039.71</td>
<td>24,348</td>
</tr>
<tr>
<td>5 90402, Santa Monica, CA</td>
<td>$9,663.99</td>
<td>71.99%</td>
<td>$147,471.09</td>
<td>12,059</td>
</tr>
</tbody>
</table>
Final Tips & Housekeeping Items

The following are a few final tips to help as you explore SimplyAnalytics.

Renaming Your Project

Users can rename projects by clicking on the “Current Project” section and providing a new name. Simply click, enter a new name, and press enter.

Deleting Your Project

You can delete your project by clicking on the Project Settings option towards the top-right of the page and selecting Delete Project.
Optional Geographies

SimplyAnalytics contains geographies that are always on, including: USA, States, Counties, Cities, ZIP Codes, Census Tracts and Census Block Groups.

However, SimplyAnalytics includes some additional geographies that you have to manually turn on from within the Project Settings screen shown below.

Please note that these optional geographies may yield an N/A for certain datasets, but they generally work very well with ACS/Community Demographics data.

Historical Mode

Since geographic boundaries change over time, data from earlier census releases might not be available in current boundaries. Selecting a historical census geographic year allows you to access data and locations that are in older census geographic units by filtering the data and locations available in the tabs on the left side of the screen.

For example, if you select the 2000 census geographic year you will only see locations from 2000 and data that is compatible with the 2000 geographic year, all other data and locations will be hidden. You can then search for and add these data variables and locations to your project.

This is an advanced feature, but feel free to contact Support if you are having issues.
You can turn on Historical Mode from within the **Project Settings** page noted above.

Once on, the next time you click on New View, there will be an option to create a Historical view:

![Create a historical view](image)

In this example, a **Comparison Table** will be created, so click on Create by that option. Next, data needs to be added.

Notice that many of the data folders are grayed out and cannot be selected. This is because there is no data in those datasets for the year 2000 geographies.

There is, however, data from the 2000 Decennial Census. Feel free to open that up and add in any variables for the location.

![2000 Census Data](image)
Metadata and Documentation

Click on any data variable in the program and select **View Metadata** to read more about it.

Alternatively, you can view a data variable's metadata by clicking on the 3-dot menu from the data variable selection panel:
If desired, you can read more in-depth methodologies from our data vendors by clicking on Support > Data Documentation from the top-right of the screen.

Importing Data

Please email support@simplyanalytics.com to request the importing data guide.