



# AnySite<sup>®</sup> Segmentation UK

version 2.0

**USER GUIDE**

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# Introduction

AnySite Segmentation UK lets you work with your customer data to analyze and find new markets and sites. Use the results of your customer analysis to develop and refine marketing programs to reach your targeted customers.

AnySite Segmentation UK makes it easy to profile your customers or purchase pre-existing profiles. Application supported charts, reports, and thematic maps help you to locate and target your customers.

## In this chapter:

- ♦ **Summary of Features** .....8
- ♦ **Application Components** .....10
- ♦ **Document Conventions** .....10

# Summary of Features

AnySite Segmentation UK offers the following features:

- [Using and Creating Profiles](#)
- [Output Options](#)
- [AnySite Segmentation UK Tools](#)
- [AnySite Segmentation UK Variables](#)
- [Configurator Tools](#)

## Using and Creating Profiles

AnySite Segmentation UK creates profiles from customer, survey, or syndicated databases to help you to understand your customers, where they live, what they like and dislike, and how to reach them. Coupled with the power of AnySite and a segmentation system, AnySite Segmentation UK helps you define and tune your site strategy, and identify and target your customers to increase sales at brand locations.

Not all segmentation systems include standard profiles. If your segmentation system does not include profiles, then the list in the Profiles tab in AnySite Segmentation UK is empty, and you must create profiles (called custom or user defined profiles) to work with.

See [Chapter 4: Using Profiles](#) for more information.

## Output Options

Once you have selected or created a profile, you can choose from various types of output to describe your profile.

### Reports

The reporting features creates the following types of reports:

- Profile information – display the attributes of a single profile.
- Profile correlation – compare one profile against many profiles and display the correlation between them.

You can also create custom AnySite Segmentation UK reports and edit existing reports.

See [Chapter 5: Using Reports](#) for more information.

## Charts

The charting feature displays profile information in a number of chart formats. You can choose from several charts, or you can create custom AnySite Segmentation UK charts. The following table summarizes the AnySite Segmentation UK chart options:

Type of Chart	Chart	Description
Bar chart 1	Single profile bar chart	Display a single profile's attributes as bars.
Bar chart 2	Two profile bar chart	Display the attributes of two profiles side by side as bars.
Bar line chart	Fever line chart	Display two profiles one on top of the other with one profile displayed as bars.
Scatter plot 1	Game plan chart	Display two attributes of a single profile as x and y values.
Scatter plot 2	Two profile cluster index chart	Display a common attribute of two profiles as x and y values.

See [Chapter 6: Using Charts](#) for more information.

## Thematic Maps

The thematic mapping feature creates maps that color-code specific information about a profile. You can create themes that shade geography by:

- Cluster.
- Estimated customer units, where a unit is the base demographic of the profile, such as households.
- Penetration index.
- Volume index.
- Estimated demand.

You can also use the Configurator to set up thematic layers that shade your map according to profile variables.

## AnySite Segmentation UK Tools

AnySite Segmentation UK tools imports and exports profiles, update .tab or .dbf files with a cluster code column, and create new cluster groups that you can use in reports, charts, and maps.

### AnySite Segmentation UK Variables

Depending on the customer data, the profiling process is capable of creating five variables to help you understand your customers. These variables include Estimate Customer Population, Effective Population, Penetration Index, Volume Index, and Estimated Demand. Within AnySite, these variables are used wherever existing demographic variables are used, such as in reports, thematic maps, hot spots, or capture methods that help automate the process of defining store trade areas.

### Configurator Tools

The Configurator tools available for AnySite Segmentation UK let you specify your segmentation system and segmentation data path, set up permissions for segmentation data use, and specify range templates to use with segmentation variables when creating thematic maps.

## Application Components

AnySite Segmentation UK requires three primary components:

- AnySite Client – The AnySite client provides the mapping and report functionality to analyze existing or potential sites.
- AnySite Segmentation UK – The AnySite Segmentation UK provides the power to import, export, or create profiles, create target groups and reports, and chart or export the profile results.
- Your segmentation cluster system – Your segmentation cluster system, such as Atomic Cube is the supporting profiling database.

Other lifestyle profile databases are optional.

## Document Conventions

This guide may provide full paths to menu commands. For example, **File > Print** is the same as “on the **File** menu, click **Print**”.

All examples in this guide use a segmentation system that can be purchased with AnySite Segmentation UK. Results will vary depending on the segmentation system you have purchased.

The term for a classification use in AnySite Segmentation UK is cluster. Your segmentation system may use a different term, such as segment, code, or classification. See the documentation provided with your segmentation system for a list of terms and their definitions. See [Understanding Segmentation Clusters on page 23](#) for information about segmentation clusters.

# Installation

This chapter explains how to install AnySite Segmentation UK. It also describes the system requirements and other prerequisites for installing the tool.

## In this chapter:

- ♦ **System Requirements** .....12
- ♦ **Installation Procedure** .....12
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- ♦ **Setting User and User Group Permissions** .....18
- ♦ **Removing AnySite Segmentation UK from Your System** .....20

# System Requirements

AnySite Segmentation UK requires a system with an AnySite installation. There are no additional requirements.

## Installation Procedure

Install AnySite Segmentation UK to the same machine and directory where AnySite is installed.

The installation instructions for install AnySite Segmentation UK are valid for a:

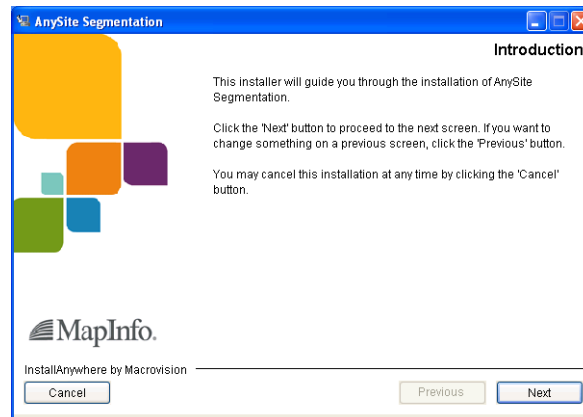
- New installation of AnySite Segmentation UK.
- Upgraded installation of AnySite Segmentation UK.

To install AnySite Segmentation UK:

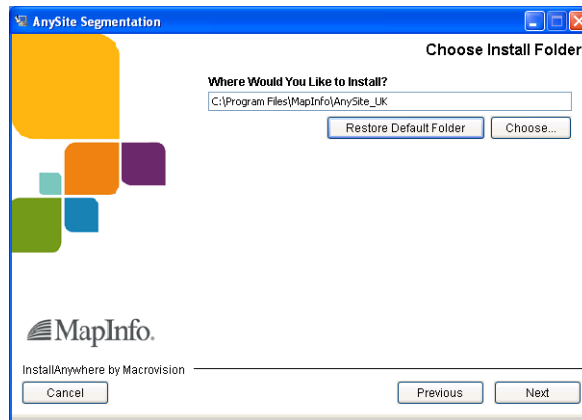
1. Exit all running programs.
2. Insert the AnySite Segmentation UK CD into the drive.

If the install window does not appear, on Microsoft **Start** menu, click **Run**. Enter **<drive>:\InstData\setup.exe** (for example, D:\InstData\setup.exe).

3. At the Introduction screen, click **Next**.

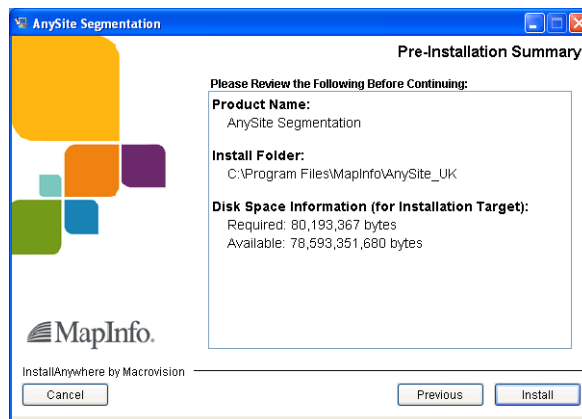


- At the Choose Install Folder screen enter the folder you want to install AnySite Segmentation UK into if it is different from the default location.



To select a different location, click **Choose** and navigate to the folder where you want to install AnySite Segmentation UK.

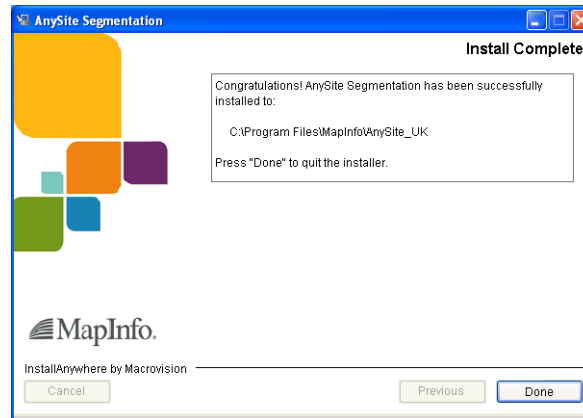
- At the Pre-Installation Summary screen, review your installation choices and click **Install** to begin installing AnySite Segmentation UK. To change any settings, click **Previous**.



## Post-Installation Tasks

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6. The Installing AnySite Segmentation UK screen shows the installer's progress. When the installation is complete, you will see a screen indicating that the installation was successful. Click **Done** to exit the installer.



## Post-Installation Tasks

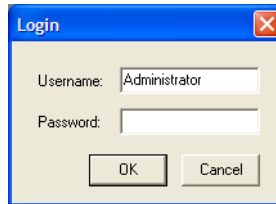
After installing AnySite Segmentation UK, you must recatalog your data and specify ASDE settings. Both of these tasks use the AnySite Configurator. For more information on these tasks, see the following topics:

1. [Specifying ASDE Settings](#)
2. [Cataloging Data](#)
3. [Setting Thematic Range Shades for Profiles](#)

### Specifying ASDE Settings

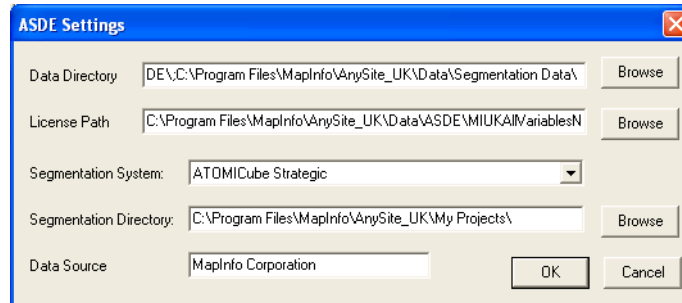
After adding data to the AnySite catalog, you must configure the AnySite Data Engine (ASDE) to make full use of the catalog. To do this:

1. In the Microsoft **Start** menu, click **All Programs > MapInfo > AnySite UK > AnySite Configurator**. This starts the AnySite Configurator.
2. Log into the AnySite Configurator as a user with Full Access permissions for AnySite.



**Note** Use the default login of **Administrator** with a blank password, or use the unique login that you specified at the time AnySite was installed.

3. On AnySite Configurator menu, select **Tools > ASDE Settings**. This opens the ASDE Settings dialog.



4. In the **Data Directory** field, ensure that the path includes a semicolon and then the segmentation data path (<Segmentation Install Directory>\Data\Segmentation Data). If it does not, then click **Browse** and locate the Segmentation Data folder.
5. Ensure that the License Path field points to your new ASDE license file located in the Data\ASDE folder. If it does not, click **Browse** to locate the **Data\ASDE** folder and select your new ASDE license file.
6. In the **Segmentation System** list, select the segmentation system to use.
 

**Note** If there are no segmentation systems in the list, then click **OK** to close the dialog and then reopen it. This refreshes the dialog with the new data directory and license file.
7. The Segmentation Directory field, is set to C:\Program Files\MapInfo\AnySite\_UK\My Projects\. This is folder where AnySite Segmentation UK stores target groups, profiles, reports, and charts.
 

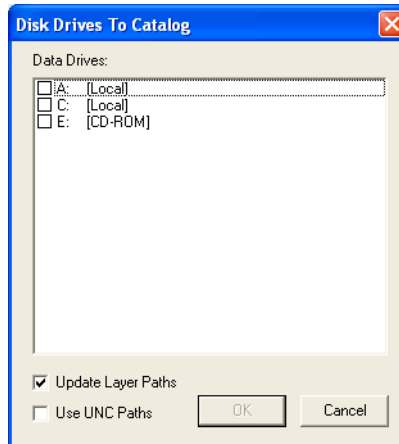
To change this directory, click **Browse** and navigate to the directory you want to use instead of the current setting. AnySite Segmentation UK users must have read, write, and modify permissions to this directory.
8. Click **OK**.

Continue setup, see [Cataloging Data](#).

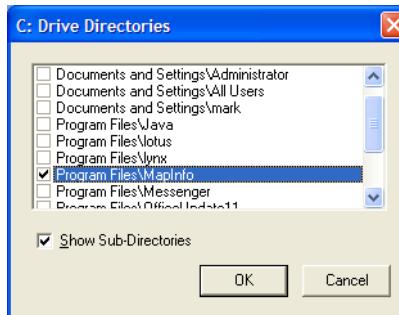
## Cataloging Data

Installing AnySite Segmentation UK adds data to your AnySite installation folder. You must add this new data to the AnySite catalog to be able to use it with AnySite Segmentation UK. To do this:

1. On AnySite Configurator menu, select **Tools > Cataloger**.
2. Complete the Disk Drives to Catalog dialog as follows:



- a. Check the drives that hold data you will use with AnySite.
  - b. If this is the first time you have installed AnySite Segmentation UK on this computer, then check the **Update Layer Paths** check box.
  - c. If you have a network installation of AnySite, then you must map the network drive before checking the **Use UNC Paths** check box.
  - d. Click **OK** to continue. The Drive Directories dialog opens.
3. Complete the Drive Directories dialog as follows:



- To catalog a directory, and its subdirectories, that is directly below the drive level, then check the box for that folder.

- To catalog a directory that is not directly below the drive level, then check **Show Sub-Directories**. This expands the directory list to include another level of subdirectories. Check the directories to catalog.

Click **OK**. If you selected more than one drive in **step 2**, then this dialog will reopen for the next drive. When you have specified the directories to catalog for all of the drives you selected, the Cataloger starts cataloging all of the data files in the directories.

The Cataloger searches for the files it needs, fixes any invalid paths to existing data, and defines the path to the segmentation data. The status bar of the AnySite Configurator (in the lower left corner of the Configurator window) indicates that the Cataloger was successful.

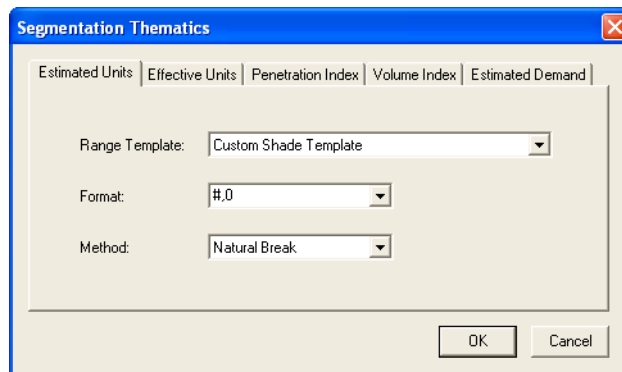
Continue setup, see **Setting Thematic Range Shades for Profiles**.

## Setting Thematic Range Shades for Profiles

A thematic range shade must be set to view a profile as a thematic on the AnySite map. To do this:

- On AnySite Configurator menu, select **Tools > Segmentation Thematics**.
- In the Segmentation Thematics dialog, select a thematic from the **Range Template** list. For example, select **4 Ranges**. (Custom Shade Template shows in the Range Template box, but it is not set until you click OK.)

Repeat this step for each tab in the dialog: Estimated Units, Effective Units, Penetration Units, Volume Index, and Estimated Demand tabs.



- Click the **Estimated Demand** tab. In the **Format** box, copy and past your currency symbol and then type #,#.00.

Copy the currency symbol from the Microsoft Character Map dialog. From the Microsoft **Start** menu, click **Programs > Accessories > System Tools > Character Map**. In the Character Map dialog, select the currency symbol to use (£) from the character map. Click **Select** and then click **Copy**. In the Segmentation Thematics dialog, paste the currency symbol before #,#.00 in the Format box.

- Click **OK**.

AnySite is now ready to launch, see **Chapter 3: Getting Started**, or continue setup by setting user and group permissions.

## Setting User and User Group Permissions

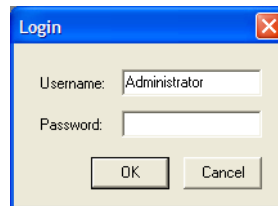
Administrators can set permission levels to users and groups of users for Segmentation. These permissions are set within the Configurator. There are three types of permissions:

- Read Only – Allows users to run all segmentation reports, charts, and thematic maps.
- Full Access – Allows users to create, modify, and delete segmentation profiles, reports, and charts, and any profiles that provide the variables used in thematic maps.
- None – Grant no permission levels to the user. The user does not have access to the AnySite Segmentation UK application.

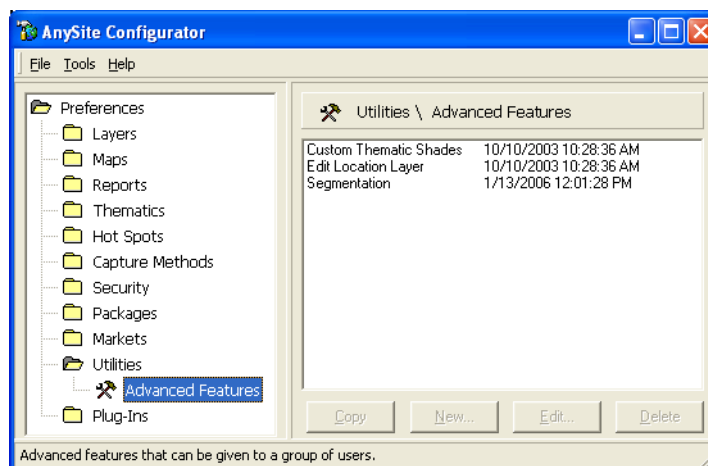
When using segmentation variables with AnySite standard reports, thematic maps, or the Capture tool, your permission level for the particular object you are using indicates whether you have permission to use those variables.

Permissions are set in the AnySite Configurator. To set Segmentation permissions, do the following:

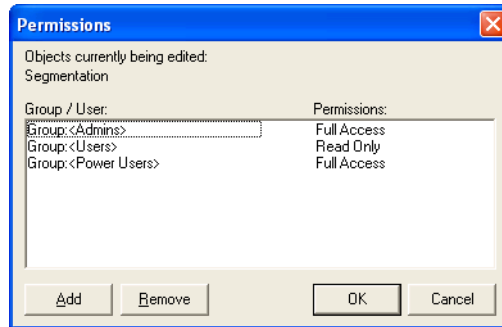
1. On Microsoft **Start** menu, click **All Programs > MapInfo > AnySite UK > AnySite Configurator**. This starts the AnySite Configurator.
2. Log into the AnySite Configurator as a user with Full Access permissions to AnySite Segmentation.



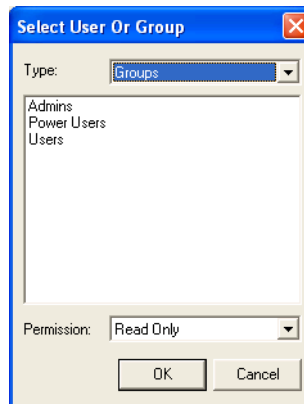
3. Double-click the **Utilities** folder.
4. Click **Advanced Features**. The Advanced Features display on the right side of the dialog.



- Right-click on **Segmentation** to display the pop-up menu, and click **Permissions**. The Permissions dialog displays on the screen.



- Click **Add** to assign permissions to a group of users or to a single user. This opens the Select User or Group dialog.



- Select either Group or User from the **Type** list.
- Click on the group or user you want to add to highlight it, and then select a permission level from the **Permissions** list.
- Click **OK** to return to the Configurator.
- The Configurator adds the group or user to the Segmentation permissions list.

For more information on users and user groups, see the AnySite documentation.

AnySite is now ready to launch, see [Chapter 3: Getting Started](#).

## Removing AnySite Segmentation UK from Your System

To remove Segmentation from your system, do the following:

1. Run the following program from the AnySite Segmentation UK installation directory:

**Uninstall AnySite Segmentation\Uninstall AnySite Segmentation.exe**

The Uninstall AnySite Segmentation UK dialog displays on the screen.

2. Click **Uninstall**. The Uninstaller starts removing AnySite Segmentation UK.
3. When the Uninstaller has finished removing AnySite Segmentation UK from your system, the Uninstall Complete dialog displays on the screen. Click **Done** to exit the Uninstaller program.

# Getting Started

AnySite Segmentation UK allows you to create profiles that you can use in reports, charts, or thematic maps. You can use standard profiles or create profiles from your customer data or a survey list. This section explains how to start a Segmentation session, and provides an overview of the main functional areas of the application.


This chapter explains how to get started using AnySite Segmentation UK's features.


## In this chapter:

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- ♦ **AnySite Segmentation UK Window Overview** .....22
- ♦ **Segmentation Workflow** .....23
- ♦ **Understanding Segmentation Clusters** .....23

## Opening AnySite Segmentation UK

To open AnySite Segmentation UK:

1. Open AnySite, if it is not open already.
2. Click the Segmentation tool  on the AnySite toolbar. This opens the AnySite Segmentation UK window.

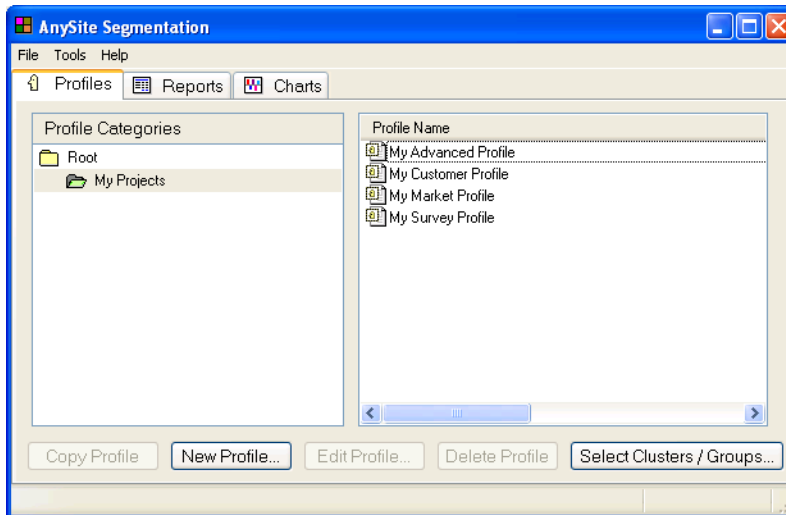
**Note** If the Segmentation tool does not display on the toolbar, then click the More Buttons tool ()

## AnySite Segmentation UK Window Overview

The AnySite Segmentation UK application window is divided into three tabs:

- Profiles tab – Lists standard and custom profiles for the segmentation system.  
A profile is a collection of distributions used to describe a geography or type of person. If the Segmentation System includes preset (standard) profiles, they are listed under the Root folder of the Profiles tab. Otherwise, this list is empty until you create profiles (called custom profiles).
- Reports tab – Displays reports to analyze and summarize data. The profile specified in the Profiles tab is the data source for the report.
- Charts tab – Displays data in chart format. The profile specified in the Profiles tab is the data source for the chart. Depending on the chart, two profiles display to visually compare them.

You can copy, edit, and delete custom profiles, reports, and charts. You can not delete or edit standard profiles.



Segmentation-specific reports and charts that do not require a map are viewed and printed from within the AnySite Segmentation UK window. To access segmentation thematic maps, return to AnySite after you have specified a profile.

The menu commands allow you to perform standard file manipulation tasks such as saving and printing, accessing Segmentation tools, and viewing the online help.

The following Segmentation tools are available:

- Update Cluster Code Column – Update a .tab or .dbf file with a cluster code.
- View Segmentation System – Select the segmentation system to work with if you have more than one installed.
- Import Profile – Manually enter or load raw counts from a .dbf or .xls file into a profile.
- Export Profile – Save profile data to a dBASE .dbf file or Microsoft Excel .xls file.
- Target Group Manager – Create new cluster groups to use in reports, charts, and thematic maps.

## Segmentation Workflow

The main segmentation workflow consists of the following steps:

1. Select or create a profile in the Profile tab.
2. Select or create the relevant report, chart, or thematic map for the selected profile.
3. Specify the options for the output you selected.
4. Publish the output.

## Understanding Segmentation Clusters

AnySite Segmentation UK clusters group neighborhoods into mutually exclusive lifestyle groups based on select geodemographic metrics, location, and indicators of consumer and lifestyle behavior. Using these clusters, you can visualize, predict, and analyze market potential and consumer expenditure patterns based on lifestyle and location.

For more information about the segmentation clusters, see the documentation provided with your segmentation system.

## Understanding Target Groups

By default, AnySite Segmentation UK reports and charts present information about each cluster individually. However, there may be situations where you want to combine the statistics from multiple clusters into groups. AnySite Segmentation UK supports this with target groups.

A target group is an organization of clusters where every cluster is assigned to one group. For example, you could create a target group with Primary Market, Secondary Market, and Non-Market groups. After assigning each cluster to one of these three groups, you could create charts and graphs that report on these groups as a whole, instead of the individual clusters.

For more information on configuring reports and charts to use target groups, see [Isolating and Aggregating Clusters on page 39](#). For more information on creating target groups, see [Managing Target Groups on page 94](#).



# Using Profiles

A profile is a collection of distributions used to describe a geography or type of person. AnySite Segmentation UK creates profiles that display in reports, charts, or thematic maps. Profiles are based on information from customer data, survey lists, or on geography. The parameters for the profile allow you to assign weights, filter information from the base tables, and assign criteria for clusters.

This chapter explains how to use the AnySite Segmentation UK profile features.

## In this chapter:

- ♦ **Using Segmentation Profiles** .....26
- ♦ **Creating a Profile** .....26
- ♦ **Copying a Profile** .....38
- ♦ **Editing a Profile** .....38
- ♦ **Deleting a Profile** .....38
- ♦ **Isolating and Aggregating Clusters** .....39

## Using Segmentation Profiles

You can view reports and charts that use profile data directly in the AnySite Segmentation UK window. You can also combine profile data with the analytical, presentation, and reporting options available through AnySite.

Profiles are saved to the MyProjects folder where AnySite is installed (C:\Program Files\MapInfo\AnySite\_UK\MyProfiles for example). This location is set in the ASDE Settings, see [Specifying ASDE Settings in Chapter 2 on page 14](#).

## Creating a Profile

AnySite Segmentation UK supports the following types of profiles:

- Customer – Use customer data to define the profile and a unit of geography as the base.
- Survey – Use a survey list to define the profile and records from the survey list as the base.
- Market – Use a unit of geography to define the profile and a unit of geography as the base.
- Advanced – Use any combination of customer data, survey list, or unit of geography for the profile and base.

The following table summarizes the differences between profile types. Use this table to select the profile type that matches your analysis goals and data.

**Comparing Profile Types**

	Customer Profile	Survey Profile	Market Profile	Advanced Profile
What is the data source?	Database or .tab file with customer information	Database or .tab file with survey results	Geography	Database, .tab file, or geography
Filter data?	Yes	Yes	No	Yes
What is the base (universe) for the data?	Geography For example, females living in a standard geography.	Database For example, people who responded to a survey with a household income greater than a value.	Geography	Database or geography
Define criteria for valid (stable) clusters?	No	No	No	Yes

For more information on creating profiles, see the following topics:

- [Creating a Customer Profile](#)
- [Creating a Survey Profile](#)
- [Creating a Market Profile](#)
- [Creating an Advanced Profile](#)

## Creating a Customer Profile

Customer profiles associate geographic data from a customer database with a segmentation cluster. For example, you can match each customer's Post Code from a database with the cluster for that Post Code.

To create a customer profile:

1. In the AnySite Segmentation UK window, select the **Profiles** tab and click **New Profile**.
2. In the New Profile dialog, select **Customer Profile** and click **OK**. This opens the New Customer Profile dialog.

3. In the **Name** field, enter the Name for this profile.
4. Under Customer List, select the data source for the customer data.
  - If the data is in a database, then select **Server** and click **Locate**. This opens the Locate Server Table dialog. See [Locating Server Data on page 35](#) for more information on completing this dialog.
  - If the data is in either a .tab or .dbf file, then select **Table** and click **Locate**. This opens the Locate Table dialog. See [Locating Tabular Data on page 36](#) for more information on completing this dialog.

5. Under Customer Subjects, refine the customer count data as follows:
  - To only include rows that meet a criteria in the profile, click **Filter** and enter the criteria.
  - To sum the count data based on a column, select the column in the **Aggregate Count** list. This is useful if you have customers who appear multiple times in the database because it treats the data related to each customer as a single record in the profile.
  - To include volume data in the profile, select the column that represents the volume from the **Volume** list.
6. Under Customer Universe, refine the base count data as follows:
  - a. Select the customer data:

To locate and combine geographies that include customers, check the **Neighborhood Coverage Area** check box. This creates a base geography for analysis data.

To select geographies for the analysis data, click **Select**. This opens the Select Geography dialog. Select the geographies that encompass the customer data. The customer universe should include all of the geographies represented by the customer list. For more information, see [Selecting Geographies on page 37](#).
  - b. In the **Units** list, select the units for the base data. These units must match the customer data units.
7. Click **OK** to create the profile.

The profile appears in the My Projects folder at the bottom of the Profile Categories list. See [Organizing the My Projects Folder on page 37](#) for more information on this folder.

## Creating a Survey Profile

Survey profiles compare two populations from the same database or table. This shows how the two populations differ.

To create a survey profile:

1. In the AnySite Segmentation UK window, select the **Profiles** tab and click **New Profile**.
2. In the New Profile dialog, select **Survey Profile** and click **OK**. This opens the New Survey Profile dialog.

3. In the **Name** field, enter the Name for this profile.
4. Under Survey List, select the data source for the survey data.
  - If the data is in a database, then select **Server** and click **Locate**. This opens the Locate Server Table dialog. See [Locating Server Data on page 35](#) for more information on completing this dialog.
  - If the data is in either a .tab or .dbf file, then select **Table** and click **Locate**. This opens the Locate Table dialog. See [Locating Tabular Data on page 36](#) for more information on completing this dialog.
5. Under Survey Subjects, refine the survey count data as follows:
  - To only include rows that meet a criteria in the profile, click **Filter** and enter the criteria.
  - To sum the count data based on a column, select the column in the **Aggregate Count** list. This is useful if you have customers who appear multiple times in the database because it treats the data related to each customer as a single record in the profile.
  - To include volume data in the profile, select the column that represents the volume from the **Volume** list.

## Creating a Profile

- Under Survey Universe, click **Filter** and enter the criteria for the survey base. The survey subjects are compared against this universe. The survey universe should include all rows that are in the survey list.
- Click **OK** to create the profile.

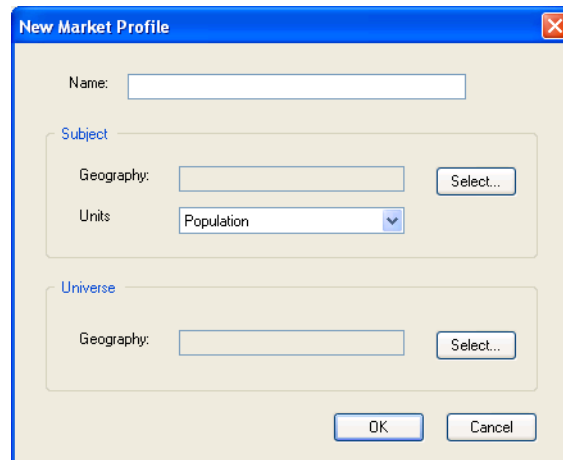
The profile appears in the My Projects folder at the bottom of the Profile Categories list. See [Organizing the My Projects Folder on page 37](#) for more information on this folder.

## Creating a Market Profile

Market profiles compare two geographies. This allows you to quickly see how the two geographies differ.

To create a market profile:

- In the AnySite Segmentation UK window, select the **Profiles** tab and click **New Profile**.
- In the New Profile dialog, select **Market Profile** and click **OK**. This opens the New Market Profile dialog.



- In the **Name** field, enter the Name for this profile.
- Under Subject, define the subject market as follows:
  - Click **Select** to open the Select Geography dialog. From this dialog, select the geographies for the subject market. For more information, see [Selecting Geographies on page 37](#).
  - In the **Units** list, select the units for the customer data.
- Under Universe, click **Select** to open the Select Geography dialog. From this dialog select the geographies that you are comparing the subject market to. The universe geography must include the entire subject geography. For more information, see [Selecting Geographies on page 37](#).
- Click **OK** to create the profile.

The profile appears in the My Projects folder at the bottom of the Profile Categories list. See [Organizing the My Projects Folder on page 37](#) for more information on this folder.

## Creating an Advanced Profile

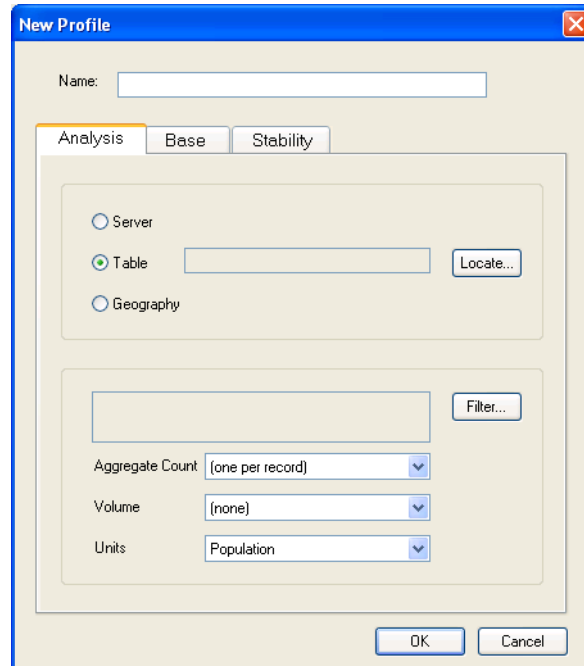
If the other types of profiles do not meet your requirements or you want to exclude clusters from your profile, then create an advanced profile. Advanced profiles include all of the features available in the other profile types.

To create an advanced profile

1. In the AnySite Segmentation UK window, select the **Profiles** tab and click **New Profile**.
2. In the New Profile dialog, select **Advanced Profile** and click **OK**. This opens a different New Profile dialog.
3. Follow the instructions in the next sections for each tab in the New Profile dialog. Configure information in each of these tabs, Analysis tab, Base tab, and Stability tab, before clicking **OK** to generate the profile.

After completing these steps, the profile appears in the My Projects folder at the bottom of the Profile Categories list. See [Organizing the My Projects Folder on page 37](#) for more information on this folder.

*Under the Analysis tab, configure the following:*



The screenshot shows the 'New Profile' dialog box with the 'Analysis' tab selected. The dialog has a title bar with 'New Profile' and a close button. Below the title bar is a 'Name:' text box. The 'Analysis' tab is active, and there are three radio buttons: 'Server', 'Table', and 'Geography'. The 'Table' radio button is selected. To the right of the 'Table' radio button is a text box and a 'Locate...' button. Below these is a 'Filter...' button. At the bottom of the dialog are 'OK' and 'Cancel' buttons. The 'Aggregate Count' dropdown is set to '(one per record)', the 'Volume' dropdown is set to '(none)', and the 'Units' dropdown is set to 'Population'.

1. Select the source of the profile data. The possible choices are:
  - If the data is in a database, then select **Server** and click **Locate**. This opens the Locate Server Table dialog. See [Locating Server Data on page 35](#) for more information on completing this dialog.
  - If the data is in either a .tab or .dbf file, then select **Table** and click **Locate**. This opens the Locate Table dialog. See [Locating Tabular Data on page 36](#) for more information on completing this dialog.
  - If the data is a geographic entity, then select **Geography** and click **Locate**. This opens the Select Geography dialog. From this dialog, select the geographies for the analysis data. For more information, see [Selecting Geographies on page 37](#).
2. If the data is coming from a database or file, then you can refine the data as follows:
  - To only include rows that meet a criteria in the profile, click **Filter** and enter the criteria.
  - To sum the count data based on a column, select the column from the **Aggregate Count** list. This is useful if you have customers who appear multiple times in the database, because it treats the data related to each customer as a single record in the profile.
  - To include volume data in the profile, select the column that represents the volume from the **Volume** list.
3. In the **Units** list, select the units for the data.
4. Click the **Base** tab and continue with the instructions in the next section.

**Under the Base tab, configure the following:**

1. Select the source of the universe data. The universe data must include all of the analysis data. The possible choices are:
  - If the data is in a database, then select **Server** and click **Locate**. This opens the Locate Server Table dialog. See [Locating Server Data on page 35](#) for more information on completing this dialog.
  - If the data is in either a .tab or .dbf file, then select **Table** and click **Locate**. This opens the Locate Table dialog. See [Locating Tabular Data on page 36](#) for more information on completing this dialog.
  - If the data is a geographic entity, then select **Geography** and click **Locate**. This opens the Select Geography dialog. From this dialog, select geographies for the analysis data. For more information, see [Selecting Geographies on page 37](#).  
 To locate and combine geographies that include customers, select **Geography** and then check the **Neighborhood Coverage Area** check box. This creates a base geography for analysis data.
2. If the data is coming from a database or file, then you can refine the data as follows:
  - To only include rows that meet a criteria in the profile, click **Filter** and enter the criteria.
  - To sum the count data based on a column, select the column from the **Aggregate Count** list. This is useful if you have customers who appear multiple times in the database because it treats the data related to each customer as a single record in the profile.
3. In the **Units** list, select the units for the data. These units must match the analysis data units.
4. Click the **Stability** tab and continue with the instructions in the next section.

*Under the Stability tab, configure the following:*

The screenshot shows the 'New Profile' dialog box with the 'Stability' tab selected. At the top, there is a 'Name:' text box. Below it are three tabs: 'Analysis', 'Base', and 'Stability'. The 'Stability' tab contains two main sections: 'Criteria for Valid Clusters' and 'Uses Surrogate'. The 'Criteria for Valid Clusters' section is divided into 'Analysis Clusters' and 'Base Clusters'. Each has two rows of settings: 'Must have at least' with a numeric input field (set to 0) and 'counts', and 'Must consist of at least' with a numeric input field (set to 0) and 'percent of profile'. The 'Uses Surrogate' section has two radio buttons: 'Average Total' (which is selected) and 'Average Group'. The 'Average Group' option is followed by a drop-down menu. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

1. Under Criteria for Valid Clusters, enter the minimum data requirements for the analysis and base data. Clusters that do not meet this criteria are considered to be unstable by AnySite Segmentation UK.
2. Under Uses Surrogate, select one of the following methods for handling unstable clusters:
  - Average Total – Gives all unstable clusters an index of 100.
  - Average Group – Gives all unstable clusters the index of their group. Select the cluster group from the drop-down list.
3. Click **OK** to create the profile.

## Locating Server Data

Before you can use data from a database server with AnySite Segmentation UK, you must configure a remote database connection in AnySite Configurator. For more information about this, see the AnySite documentation.

The new profile dialog gives you the option to locate Server data as described under **Creating a Customer Profile**, **Creating a Survey Profile**, **Creating a Market Profile**, and **Creating an Advanced Profile**. After clicking **Locate** in a new profile dialog, the Locate Server Table dialog opens. Complete the Locate Server Table dialog as follows:

1. From the **Database** list, select the database with the data you want to use in the profile.

2. Select one of the following:

If the data is only in a single table, then select the **Table** option and then select the table from the drop-down list of tables.

If the data spans multiple tables, then select the **Query** option and write in the query box a query to join the data together. Click **Verify Query** to validate the query.

3. Under Input Columns, select the column that contains the information AnySite Segmentation UK can use to associate each row with a cluster. Select the column you want to use:

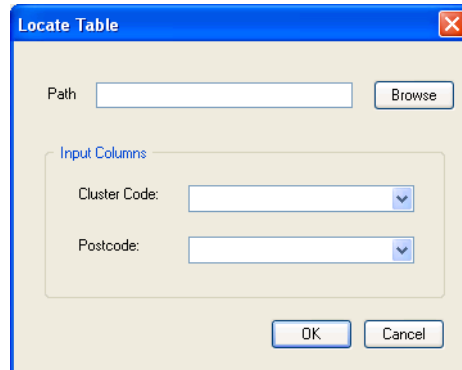
- Cluster Code – AnySite Segmentation UK will associate the row with this cluster code. This is the most efficient method.
- Post Code – AnySite Segmentation UK will determine which Output Area is most representative of this Post Code and then look up the cluster code that is associated with that Output Area.

4. Click **OK** to close this dialog and return to the Profile Configuration dialog.

## Locating Tabular Data

The new profile dialog give you the option to locate tabular (table) data as described under [Creating a Customer Profile](#), [Creating a Survey Profile](#), [Creating a Market Profile](#), and [Creating an Advanced Profile](#).

After clicking **Locate** in a new profile dialog, the Locate Table dialog opens. Complete the Locate Table dialog as follows:

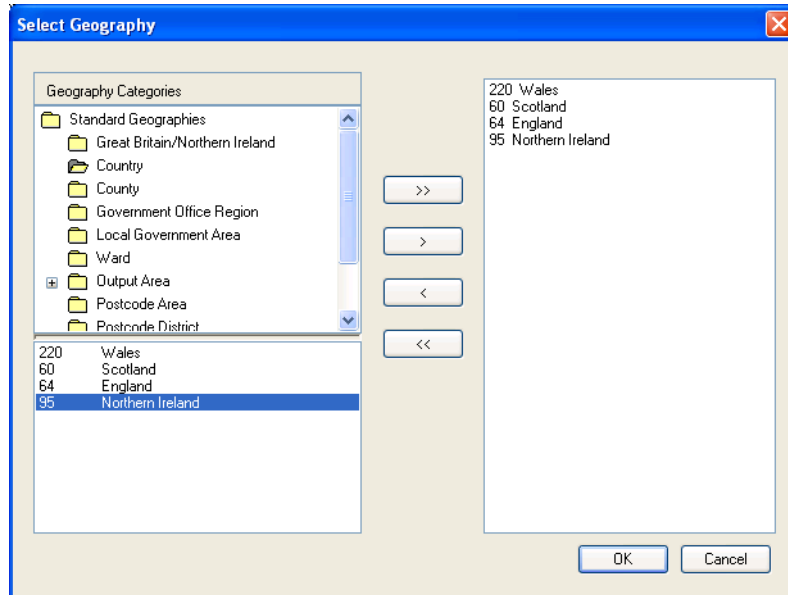


1. In the Path field, enter the path and filename of the .dbf or .tab file, or click **Browse** and find the file on the computer.
2. Under Input Columns, select the column that contains the information AnySite Segmentation UK can use to associate each row with a cluster. Select the column you want to use for one of the following:
  - Cluster Code – AnySite Segmentation UK will associate the row with this cluster code. This is the most efficient method.
  - Post Code – AnySite Segmentation UK will determine which Output Area is most representative of this Post Code and then look up the cluster code that is associated with that Output Area.
3. Click **OK** to close this dialog and return to the Profile Configuration dialog.

## Selecting Geographies

The new profile dialog gives you the option to specify a geography for a market profile, as described under **Creating a Market Profile**, or to specify universe data for a customer profile, as described under **Creating a Customer Profile** or **Creating an Advanced Profile**.

After clicking **Select** in a new profile dialog to specify a geography for your profile or universe data, the Select Geography dialog opens.



To select geographies using this dialog, then under Geography Categories, select a geography that you want to include and then click > to move them to the Selected Geographies list. To add all of the geographies from a folder, select the folder and click >>.

To use a geography based on an AnySite study area, such as drive times, rings, sectors, or custom boundaries, then create a benchmark index of that study area in AnySite. After creating the index, you will be able to select it from the AnySite Index Areas folder in the Geography Categories list. For information about study areas or creating benchmark indexes, see the AnySite documentation.

## Organizing the My Projects Folder

By default, user-created profiles are all listed in the My Projects folder under the Profiles tab. If you want to organize these folders in a hierarchy, then you can do so at the operating system level. To do this:

1. Create subdirectories under the segmentation directory.
2. Move the profile.xml files from the segmentation directory to the subdirectories.

The next time you start AnySite Segmentation UK, the profiles will be organized according to the directory structure.

# Copying a Profile

AnySite Segmentation UK allows you to make copies of any profile, except for the prepackaged profiles supplied with a segmentation system. Create copies of a profile to create many similar charts.

To copy a profile:

1. In the AnySite Segmentation UK window, select the **Profiles** tab.
2. Under the Profiles tab, select the profile you want to copy and click **Copy Profile**.

# Editing a Profile

AnySite Segmentation UK allows you to edit any profile in the My Projects folder, except for the prepackaged profiles supplied with a segmentation system.

To edit a profile:

1. In the AnySite Segmentation UK window, select the **Profiles** tab.
2. Under the Profiles tab, select the profile you want to edit and click **Edit Profile**. This opens the Edit Profile dialog.
3. Change your profile by modifying the values under the dialog's tabs.

**Note** The Edit Profile dialog shows more options for configuring a profile than you originally saw when you created the profile. You can only change the settings in this dialog that apply to the type of profile you are editing. For example, if the profile you are editing was created as a customer profile, then you cannot configure stability settings for the profile.

4. Click **OK** to save your changes.

# Deleting a Profile

You can delete any profile in the My Projects folder, except for the prepackaged profiles supplied with a segmentation system.

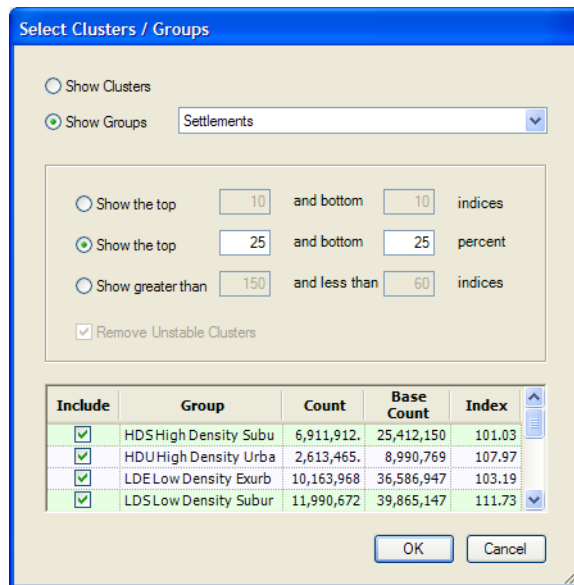
To delete a profile:

1. In the AnySite Segmentation UK window, select the **Profiles** tab.
2. Under the Profiles tab, select the profile you want to delete and click **Delete Profile**.

## Isolating and Aggregating Clusters

AnySite Segmentation UK normally presents information about all clusters in its reports and charts. However, you can also specify particular clusters of interest or target groups to use. To do this, perform the following steps:

1. In the AnySite Segmentation UK window, select the **Profiles** tab.
2. Under the Profiles tab, click **Select Clusters/Groups**. This opens the Select Clusters/Groups dialog.



3. To show cluster data in reports and charts, select **Show Clusters**. To show aggregate target group data, select **Show Groups** and select the target group you want to use.
4. To automatically hide results that do not meet specific criteria, select one of the following options:
  - To only show the results with the highest and lowest index values, select **Show the top and bottom indices** and enter the number of matches you want to show for each.
  - To only show the clusters that account for the clusters that make up a set percentage of the total analysis count, select **Show the top and bottom percent and enter the percentage**. For more information on this option, see [Showing Clusters by Analysis Percent on page 40](#).
  - To only show results with index values above or below thresholds, select **Show greater than and less than indices** and enter the index values you want to use as thresholds.
  - To remove unstable clusters from the results, check the **Remove Unstable Clusters** check box. The clusters or groups that meet this criteria for the currently selected profile appear with a green background in the grid at the bottom of the dialog.

## Isolating and Aggregating Clusters

5. If there is a cluster or group that you do not want to include in reports or charts, then clear the Include check box next to its name in the grid. Right-clicking on the list displays a menu with options to select or deselect all clusters.
6. Select the columns of values to include in the reports or charts by right-clicking on the grid to display a menu of available columns. Check or clear column names in the menu.
7. Click **OK**.

As you view reports and charts in AnySite Segmentation UK, you will only see results that match the criteria you specified in the Select Clusters/Groups dialog.

## Showing Clusters by Analysis Percent

The Select Clusters/Groups dialog gives you the option of showing the top and bottom clusters for a percentage of the analysis count. Using this filter allows you to determine the minimal set of clusters that make up a certain proportion of the analysis count.

The following examples demonstrate how AnySite Segmentation UK determines which clusters to display when you use this filter. (Your cluster system will have different information than what is in these examples.)

### Example: Show the top 5 and bottom 0 percent

Row	Cluster Name	Index	Analysis Count	Cumulative Count
1	Urban Stress	270	96,846	96,846
2	Parchment Hill	234	74,147	170,993
3	Professional Duos	221	130,341	301,335
4	Hip Nation	208	130,017	431,351
5	Old Metro, New Hands	204	68,275	499,626
	<b>TOTAL</b>		<b>6,565,628</b>	

The first five clusters in a profile, sorted by cluster index from highest to lowest.

To determine which clusters make up the top five percent of the analysis count, AnySite Segmentation UK first calculates the total analysis count for the profile. This total includes the analysis count from every cluster and not just the ones shown here. The total count for this profile is 6,565,628. Five percent of this total is 328,281, which is our cutoff value.

To determine which clusters are included in the report, AnySite Segmentation UK adds each cluster from the highest index to the lowest, in order. After adding a cluster, it examines the cumulative count of the clusters in the report to see if the total count has passed the cutoff value.

In this sample, we see that after adding the fourth cluster, Hip Nation, the cumulative count is greater than the cutoff value. A report using these criteria and data would only show the first four clusters.

**Example: Show the top 0 and bottom 3 percent**

Row	Cluster Name	Index	Analysis Count	Cumulative Count
1	Military Towns	0	0	0
2	Backwoods Blues	5	3,151	3,151
3	Family Farm Belt	21	30,663	33,814
4	Up-Country Environs	25	12,796	46,610
5	Plow and Plateau	28	27,346	73,956
6	Extraction Action	29	33,119	107,075
7	Moo's and Modems	40	45,477	152,552
8	Irrigation Nation	44	19,439	171,991
9	Middleburgh	47	42,062	214,053
	<b>TOTAL</b>		<b>6,565,628</b>	

The first nine clusters in a profile, sorted by cluster index from lowest to highest.

To determine which clusters make up the bottom three percent of the analysis count, AnySite Segmentation UK first calculates the total analysis count for the profile. This total includes the analysis count from every cluster and not just the ones shown here. The total count for this profile is 6,565,628. Three percent of this total is 196,968, which is our cutoff value.

Determining which clusters meet the bottom 3 percent criteria is similar to determining which clusters meet a top percent criteria. However, for the bottom percent, AnySite Segmentation UK adds clusters from the lowest index value to the highest.

In this sample, we pass the cutoff value after adding the ninth cluster, Middleburgh. A report using this criteria and data would only show the first nine clusters.



# Using Reports

This chapter discusses how to use reports to view your data. Reports provide an attractive and effective way to analyze and summarize your data.

## In this chapter:

- ♦ **Standard Reports** .....44
- ♦ **Viewing a Report** .....48
- ♦ **Creating a Report** .....50
- ♦ **Organizing the My Projects Folder** .....53
- ♦ **Copying a Report** .....54
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## Standard Reports

AnySite Segmentation UK comes with a set of standard reports that you can use to summarize profile data. Each of the standard reports belongs to one of the following categories:

- **Profile Information Reports**
- **Profile Correlation Reports**
- **Target Group Index Report**
- **Market Potential for Product Report**

The standard reports cannot be modified directly. To modify a standard report, you must create a copy of the report and then modify it.

### Profile Information Reports

The profile information reports are summary reports that show information about each profile and, in some reports, the profile's group.

AnySite Segmentation UK includes the following profile information reports. (Your cluster system will have different information than what is in these examples.)

#### Cluster Descriptions

This report describes each cluster and shows its penetration index for the profile. You can use this report to learn about high-index and low-index clusters for your profile.

#### Standard Report

This report shows the penetration index and some related statistics for each cluster.

**Figure: Example Rows from a Standard Description Report**

Standard Report : Customers - Store Aggregate						
	Code	Cluster Name	Count	Base Count	Penetration	Index
1	R2_53	Southern Country	32,136	1,312	2449.39%	14612.56
2	R1_29	Family Acres	56,277	44,016	127.86%	762.76
3	S2_36	Active Seniors	40,456	46,514	86.98%	518.88

Index is a measure of performance between clusters. An index value of 100 shows that two clusters have the same proportion as the base and that the profiles being compared have the same penetration. An index greater than 100 shows that the target profile has a greater proportion of the cluster than the base. An index of less than 100 shows that the target profile has proportionally less of that cluster than the base (it under represents). The index calculation is:

$$(\text{TargetProfile}\% / \text{Base}\%) * 100$$

Penetration is the number of clusters that the target profile captures. It is the percent of the target profile compared to the base for each cluster. The penetration calculation is:

$$(\text{TargetProfile}\# / \text{Base}\#) * 100$$

## Volume Report

The volume report is a detailed report that includes volume information from the profile. This report compares a target profile that contains volumetric data to a base profile from where the volumetric data was drawn. Use this report to find consumption information, such as quantity sold, sales volume, or amount of consumption.

**Figure: Example Rows from a Volume Report**

Volume Report: Customers - Store Aggregate												
	Code	Cluster Name	Count	%	Base Count	%	Volume	%	Penetration	Cluster Index ▾	Volume Index	Average Volume
1	R2_53	Southern Country	32,136	2.53%	1,312	0.02%	232,347.27	3.05%	2449.39%	14612.56	17589.51	7.23
2	R1_29	Family Acres	56,277	4.44%	44,016	0.58%	329,841.98	4.33%	127.86%	762.76	744.30	5.86
3	S2_36	Active Seniors	40,456	3.19%	46,514	0.62%	262,686.40	3.45%	86.98%	518.88	560.92	6.49

## Cluster by Group Report

This report presents the clusters in their major groups. For more information about segmentation clusters and their groups, see the documentation supplied with your segmentation system.

**Figure: Example Rows from a Cluster by Group Report**

Cluster by Group Report: Customers - Store Aggregate									
	Code	Cluster Name	Count	%	Base Count	%	Penetration	Index ▾	
<b>Low Density Exurban 2</b>									
	LDE2_42	Country Roads	15,729	1.24%	24,702	0.33%	63.68%	379.87	
	LDE2_44	Middleburgh	27,064	2.13%	127,483	1.69%	21.23%	126.65	
			<b>42,793</b>	<b>3.38%</b>	<b>152,185</b>	<b>2.01%</b>	<b>28.12%</b>	<b>167.75</b>	

## Cumulative Report

This report shows the cumulative totals for each row in the report. For example, the third row would show the sum of the first and second rows, plus the values from the third-row cluster. Cumulative reports are useful when you want to see which clusters make up a certain percentile of the analysis count. For example, you could use a cumulative report to see which clusters make up 25% of your customer base.

**Figure: Example Rows from a Cumulative Report**

Cumulative Report: Customers - Store Aggregate									
	Code	Cluster Name	Cumulative Count	%	Cumulative Base Count	%	Penetration	Index ▾	
1	R2_53	Southern Country	32,136	2.53%	1,312	0.02%	2449.39%	14612.56	
2	R1_29	Family Acres	88,413	6.97%	45,328	0.60%	195.05%	1163.64	
3	S2_36	Active Seniors	128,869	10.17%	91,842	1.21%	140.32%	837.10	

## Profile Correlation Reports

Profile correlation reports compare the profile to a set of variables from another profile. This is most often used to compare a customer profile to a list of product profiles.

Rank order correlation values indicate the relationship between two index values. The correlation values can range between -1 and 1, where positive values indicate a relationship and negative values indicate an inverse relationship. For example, we expect a positive correlation between computer and keyboard sales and a negative correlation between people with peanut allergies and household nut purchases. For strong relationships, the correlation values are closer to -1 and 1, while weaker relationships have values closer to 0.

The correlation values in the reports have two or fewer asterisks next to them. These asterisks indicate the statistical significance of the correlation value. Two asterisks mean that only one correlation that is this strong in every hundred (1 out of 100 times) could be due to chance. One asterisk means that only five correlations that are this strong in every hundred (5 out of 100 times) could be due to chance.

Correlations are meant to be used as a directional guide only. A high positive correlation does not mean that your customers do an activity or buy a product. It means that the profile of the activity or product is most similar to the profile of your customers.

For more information on rank order correlation and significance, see a statistical reference. Note that rank order correlation values are also known as Spearman rank correlation coefficients.

**Note** The Spearman's Rank-Order Correlation is a measure that communicates the degree of relationship (similarity) between profiles. This is known as the *r* value. Values range between +1.0, which is a perfect positive relationship between two profiles, zero (0), which is no relationship, to -1.0, which is a perfect negative relationship.

## Target Group Index Report

A Target Group Index report ranks the Target Group Index (TGI) values for a selection of profiles. The TGI value is Target Group Penetration / Total Penetration \* 100.

**Figure: Example Target Group Index Report**

Target Group Index Report : Urban 1			
	Profile	TGI	▼
1	Lease Vehicle	103.35	
2	Own Any Imported Vehicle	100.71	
3	Buy Vehicle	87.24	
4	Own Any Domestic Vehicle	80.12	

A Target Group Index report ranks a collection of profiles according to how they index against a specified Target Group. Typically a Target Group system is defined to segment the clusters into three main groupings: Primary, Secondary and Tertiary targets. All other clusters will be designated to a group called Other.

A marketing campaign might need to address each group differently because the products, services, attitudes, and means of reaching these customers will be different between the groups. This report helps design the appropriate campaign for each group.

The report displays the profile descriptions (optionally in descending order) according to the Target Group Index (TGI). The TGI is computed by comparing the penetration of the Target Group with the entire profile. More formally, the total customer count for the Target Group clusters is computed, and the total base count for the Target Group clusters is computed. The ratio of users to base users is the Target Group Penetration. The total penetration is then computed by performing the same calculation over all the clusters (not just the Target Group clusters). Finally, the index is computed by dividing the Target Group Penetration by the Total Penetration and multiplying the result by 100.

## Market Potential for Product Report

A Market Potential for Product report lists the market potential, base count, and Market Potential Index (MPI) by geography for a profile.

**Figure: Example Market Potential for Product Report**

Market Potential for Product : Lease Vehicle				
	Geography	Potential ▼	Base Count	MPI
1	Huntington Beach	21743	199571	132.03
2	Costa Mesa	10487	112844	112.62
3	Newport Beach	8236	74273	134.38

This report helps you rank geographies according to a profile criterion. Typically you would select many geographies to compare against a single profile. The report includes the following for each of the geographies:

- Potential – The Market Potential; the number of potential users.
- Base Count – The base count is the total number of a demographic within that geographic area. This is usually households, adults, or total population.
- Market Potential Index (MPI) – A value for money statistic

The profile you select is examined on a cluster by cluster basis, and the penetration is computed for each cluster (potential count divided by base count). These penetration rates are then applied against the count for the clusters in a geography. This value represents the number of users in that geography you would expect to behave in a particular way for that specific cluster. For instance, if 20% of customers from cluster 8 eat peanut butter, and in a particular geography there are 200 people from cluster 8, you could assume 40 people in that geography would eat peanut butter. This is done across all clusters and the results are summed to derive the Potential.

The MPI is a measure of how well the clusters in the profile line up with the clusters in the geography. For example, if a profile has a very high penetration in Cluster 14, then the Potential will have a high contribution from Cluster 14 if the geography itself had a high count of people in that cluster. However, if the geography has few or no Cluster 14s represented, then the high penetration lends little to no contribution of your potential, ultimately resulting in a lower index. This is performed across all clusters, so the relative contribution of the different clusters within the profiles needs to be considered.

Another way to view the two values is as a raw count and a value for money statistic. The Potential would be the number of customers you would expect to obtain in the area. The MPI is a measure of how much you would need to spend in mailings to realize that number of customers.

A profile can have a very low Potential but a large MPI. When looking at two profiles compared to the same geography, Profile 1 could have a high Potential and a low MPI, whereas Profile 2 could have a low Potential and a high MPI. The following example illustrates the situation. The two profiles are Gum chewers and Rolls Royce buyers, and the geographic area is Beverly Hills. Most people, regardless of cluster, tend to chew gum. Therefore, the selected geography is not critical, the rates will be similar across all geographies. In this case the affluence of this geographic area would suggest that less people would chew gum than average because this population engages in activities that prohibit gum chewing. Therefore although the actual count of people that chew gum would still be quite high, it would be lower than average. In other words this means a high Potential but a low MPI.

Looking at the second profile of Rolls Royce buyers, very few people actually buy this vehicle, so regardless of the geography, the actual count of those expected to buy a Rolls Royce will be low. However, in Beverly Hills, the chances of someone buying this vehicle are much higher than the average American community. This means Rolls Royce has a low Potential but a high MPI in Beverly Hills.

Therefore when reading a Market Potential Report, you should take into consideration both the Potential and the MPI. An area might show a high index for a profile, but there are only ten potential users; not enough to support the costs of a marketing campaign. Although the MPI looks good, it might actually be a geography to avoid.

## Viewing a Report

To view a report:

1. In the AnySite Segmentation UK window, select the **Profiles** tab.
2. Under the Profiles tab, select the profile you want to view with your report.
3. In the AnySite Segmentation UK window, select the **Reports** tab.
4. Under the Reports tab, select the report that you want to view. This displays the report in the AnySite Segmentation UK window.

When viewing a report, you can also perform the following actions:

- [Viewing Other Profile Attributes from the Same Category](#)
- [Re-Sorting Reports](#)
- [Filtering Clusters](#)
- [Copying a Report Data to the Windows Clipboard](#)

### Viewing Other Profile Attributes from the Same Category

When you are viewing a report, you can quickly change the profile attributes for the report. To do this, select the new profile attribute you want to see from the list above the report. The report will use data from the new profile attribute.

For profile correlation reports, this feature allows you to quickly compare one profile with many profiles from another category. To do this, select a profile from the drop-down list above the report and then use the arrow keys or mouse scroll wheel to quickly change the profile.

To change the profile attribute to an attribute in a different category, you must select the new category from under the Profiles tab. For more information on this process, see [Viewing a Report on page 48](#).

## Re-Sorting Reports

To sort the columns of a report, click on the column title that you want to sort by. This sorts the column in ascending order. Clicking on the column title again sorts the column in descending order.

## Filtering Clusters

AnySite Segmentation UK allows you to specify criteria that affect which clusters appear in a report. For more information on using this feature, see [Isolating and Aggregating Clusters on page 39](#).

## Copying a Report Data to the Windows Clipboard

You can copy report data from AnySite Segmentation UK to the Windows clipboard. This allows you to paste report data into other applications like Microsoft Excel.

To do this:

1. Display the report that you want to copy.
2. Select the table cells that you want to copy using your mouse. To quickly select rows, click on the cell to the left of the row. To quickly select the entire report, click on the cell to the left of the column titles.
3. Press **Ctrl-C** on the keyboard to copy the selected cells to the clipboard.
4. Use the paste feature in the other application to paste the data from the clipboard to the application. For example, in Microsoft Excel, press **Ctrl-V** on the keyboard.

## Creating a Report

If the standard reports do not meet your needs, then you can create a report. Before doing so, select a base geography for the analysis. From the Segmentation **Tools** menu, click **Set Default Base Geography**. In the Select Default Base Geography dialog, select the geography and units to use, and then click **OK**.

To create a report:

1. In the AnySite Segmentation UK window, select the **Reports** tab.
2. Under the Reports tab, click **New Report**. This opens the New Report dialog.

**New Report**

Report Name:

Report Type:

Report Columns

	Profile Field	Column Title	Column Width	Alignment	Format	Is Cumulative
1	Cluster Name	Cluster	100	Left		<input type="checkbox"/>
2	Analysis Count	Count	100	Right	#, #	<input type="checkbox"/>
3	Base Count	Base	100	Right	#, #	<input type="checkbox"/>
4	Penetration Perce	%	100	Center	0.00%	<input type="checkbox"/>
5	Penetration Index	Index	100	Right		<input type="checkbox"/>

Sort Column:   Descending

Has Subtotals      Title Height:

Has Total              Row Height:

Print with Grid

3. In the **Report Name** field, enter the name of the report you are creating.
4. Select the type of report you are creating from the **Report Type** list. The available report types are:
  - Profile Information – Summarizes information about a profile.
  - Profile Correlation – Shows the relationship between the indexes of different profiles.
  - Target Group Index – Lists the Target Group Index (TGI) values for a selection of profiles. The TGI value is Target Group Penetration / Total Penetration \* 100.
  - Market Potential for Product – Lists the market potential, base count, and Market Potential Index (MPI) by geography for a profile.

For samples of each of these report types, see [Standard Reports on page 44](#).

## 5. Configure the report:

- To add a row or column to the report, click **Add**.
- To remove a row or column from the report, select it in the grid and click **Remove**.
- To change where a row or column appears in the report, select it in the grid and click **Up** or **Down** to change its position in the list. The first row in the grid is the leftmost column in the report.

The following report types have specific settings. Refer to the instructions under one of the following topics and then continue with the next step.

- [Profile Information or Correlation Report Columns Settings on page 51](#)
- [Market Potential for Product Report Settings on page 53](#)

6. From the **Sort Column** list, select the report column you want to use to sort the report data. Check the **Descending** check box to sort the column from the greatest to the smallest values.7. To show a grid around each cell in the report, check the **Print with Grid** check box. To hide the grid, clear this check box.8. To show subtotals and totals in the report, check the **Has Subtotals** and **Has Total** check boxes.9. Click **OK** to save your report and close the dialog.

The report appears in the My Projects folder at the bottom of the Reports list. See [Organizing the My Projects Folder on page 53](#) for more information on this folder.

## Profile Information or Correlation Report Columns Settings

Information reports summarize profile data in a table.

	Profile Field	Column Title	Column Width	Alignment	Format	Is Cumulative	Is Group Percent	Color Scheme	Has Margins	No Right Border	
1	Cluster Name	Cluster	100	Left		<input type="checkbox"/>	<input type="checkbox"/>	By Group	<input type="checkbox"/>	<input type="checkbox"/>	Add
2	Analysis Count	Count	100	Right	#, #	<input type="checkbox"/>	<input type="checkbox"/>	None	<input type="checkbox"/>	<input type="checkbox"/>	Remove
3	Base Count	Base	100	Right	#, #	<input type="checkbox"/>	<input type="checkbox"/>	None	<input type="checkbox"/>	<input type="checkbox"/>	
4	Penetration Perce	%	100	Center	0.00%	<input type="checkbox"/>	<input type="checkbox"/>	None	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Up
5	Penetration Index	Index	100	Right		<input type="checkbox"/>	<input type="checkbox"/>	None	<input type="checkbox"/>	<input type="checkbox"/>	Down

The following instructions assume that you are in the process of creating or editing an Information report. See [Creating a Report on page 50](#) or [Editing a Report on page 54](#) for more information.

## Creating a Report

To change the settings for a column in the report, modify its row in the grid. The following table describes the settings you can configure in the grid.

**Column Settings for Profile Information Reports**

Grid Column	Description
Profile Field	Select the profile variable that you want to display in the report.
Column Title	<p>Enter the title you want to appear in the report for this column. If you do not enter a title, then the report uses a letter for the column title. The first column would be A, the second B, and so on.</p> <p>You can also include the following codes in the column title specification:</p> <ul style="list-style-type: none"><li>• &lt;AName&gt;The current profile's analysis name. For example, sales_data.dbf.</li><li>• &lt;AUnits&gt;The current profile's analysis units. For example, Adult Population.</li><li>• &lt;BName&gt;The current profile's base name. For example, Norfolk, VA.</li><li>• &lt;BUnits&gt;The current profile's base units. For example, Households.</li><li>• &lt;VName&gt;The current profile's volume name. For example, TOTAL_SALES.</li></ul> <p>For example, "Base (&lt;BUnits&gt;)" produces "Base (Households)".</p>
Column Width	The width of the report column, in pixels.
Alignment	The alignment of the report column. Possible values are Left, Center, and Right.
Format	For information on formatting numeric values, see <a href="#">Appendix A: Format Codes</a> .
Is Cumulative	Check this check box to show cumulative totals for the values in this column. For example, the third row would show the sum of the first and second rows, plus the values from the third-row cluster.
Is Group Percent	<p>Check this check box to display percentage values in a report that uses subtotals as percentages of the group population instead of as percentages of the total population.</p> <p>If this report is not displaying subtotals or this column is not a percentage value, then do not check this check box.</p>
Color Scheme	<p>Select the color scheme you want to use for this column in the report. The possible choices are:</p> <ul style="list-style-type: none"><li>• None – Do not use color in this column.</li><li>• By Cluster Color – Use each cluster's color as the background color in this column</li><li>• By Group Color – Use each cluster's group color as the background color in this column.</li></ul>

### Column Settings for Profile Information Reports *(continued)*

Grid Column	Description
Has Margins	Check this check box to add a little more space around the cells in this column.
No Right Border	Check this box to remove the grid border from the right-hand side of this column.

Optionally, configure the following settings:

- To include subtotals for each group of clusters, check the **Has Subtotals** check box.
- To include a row with totals for the data universe, check the **Has Total** check box.
- To change the height of the column heading row, enter a new value in the **Title Height** field.
- To change the height of each row in the report, enter a new value in the **Row Height** field.

## Market Potential for Product Report Settings

Market Potential for Product reports list the market potential, base count, and Market Potential Index (MPI) by geography for a profile. This report uses either geographies or profiles to show market potential.

The following instructions assume that you are in the process of creating or editing an Information report. See [Creating a Report on page 50](#) or [Editing a Report on page 54](#) for more information.

To configure the properties for a Market Potential for Product report select either:

- **Use Geographies** – To show market potential by geography.
- **Use Profiles** – To show market potential for a profile. From the **Units** list, select the units to apply.

## Organizing the My Projects Folder

By default, user-created reports are all listed in the My Projects folder under the Reports tab. If you want to organize these folders in a hierarchy, then you can do so at the operating system level. To do this:

1. Create subdirectories under the segmentation directory.
2. Move the report.xml files from the segmentation directory to the subdirectories.

The next time you start AnySite Segmentation UK, it organizes reports according to the directory structure.

# Copying a Report

AnySite Segmentation UK allows you to make copies of any report. This is useful if you want to create many similar reports or want to modify one of the standard reports.

To copy a report:

1. In the AnySite Segmentation UK window, select the **Reports** tab.
2. Under the Reports tab, select the report you want to copy and click **Copy Report**.

The new report appears in the My Projects folder at the bottom of the Reports list. See [Organizing the My Projects Folder on page 53](#) for more information on this folder.

# Editing a Report

AnySite Segmentation UK allows you to modify any report in the My Projects folder. You cannot edit any of the standard reports, but you can create copies of them and then edit the copied reports.

You cannot easily change a report's type by editing it. For the best results, we recommend creating a new report instead of editing an existing report to do this.

To edit a report:

1. In the AnySite Segmentation UK window, select the **Reports** tab.
2. Under the Reports tab, select the report you want to edit and click **Edit Report**. This opens the Edit Report dialog.
3. In the Edit Report dialog, make the changes that you require. This dialog is identical to the New Report dialog. For information on using the dialog, see [Creating a Report on page 50](#).
4. Click **OK** to save your changes to the report. Alternatively, you can click **Cancel** to close the dialog without changing the report.

# Deleting a Report

AnySite Segmentation UK allows you to delete any report in the My Projects folder, except for the prepackaged reports supplied with a segmentation system.

To delete a report:

1. In the AnySite Segmentation UK window, select the **Reports** tab.
2. Under the Reports tab, select the report you want to delete and click **Delete Report**.

# Using Charts

This chapter discusses how to analyze your data visually using charts. Charts also add visual impact to a presentation you are preparing.

## In this chapter:

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- ♦ **Creating a Chart** .....66
- ♦ **Copying a Chart** .....70
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# Standard Charts

Charts graphically depict profiles—they are a graphic representation of single profile and two-profile comparison reports. Charts are easy to read. Use them in presentations to convey the numbers found on reports.

Some segmentation systems come with a set of standard charts to analyze profile data. The standard charts are **Single Profile Bar Chart**, **Two Profile Bar Chart**, **Fever Line Chart**, **Game Plan Chart**, **Two Profile Cluster Index Chart**. You can not modify standard charts directly, you must create a copy of the chart and then modify it.

## Single Profile Bar Chart

The single profile bar chart graphically shows the cluster index for each cluster in a profile. By default, clusters are ordered by their index value, with the highest index appearing at the top of the list.

The vertical line running down the middle of the chart area indicates an index of 100. Each horizontal bar represents one of the segmentation system clusters. Bars that extend to the right of this line have an index of over 100, which indicates that the cluster has a higher penetration than the average cluster (they over-index). These are clusters with proportionally more households than the base. Bars that extend to the left of this line have an index of less than 100, which indicates that the cluster has a lower penetration than the average cluster (they under-index). These are clusters with proportionally less households than the base.

The length of the bar measures the deviation from 100. The longer the bar, the more a cluster under- or over-indexes. The width of the bar represents the number of households in the comparison profile by cluster (%). A thick bar represents many households in the cluster. A thin bar represents very few households in the cluster.

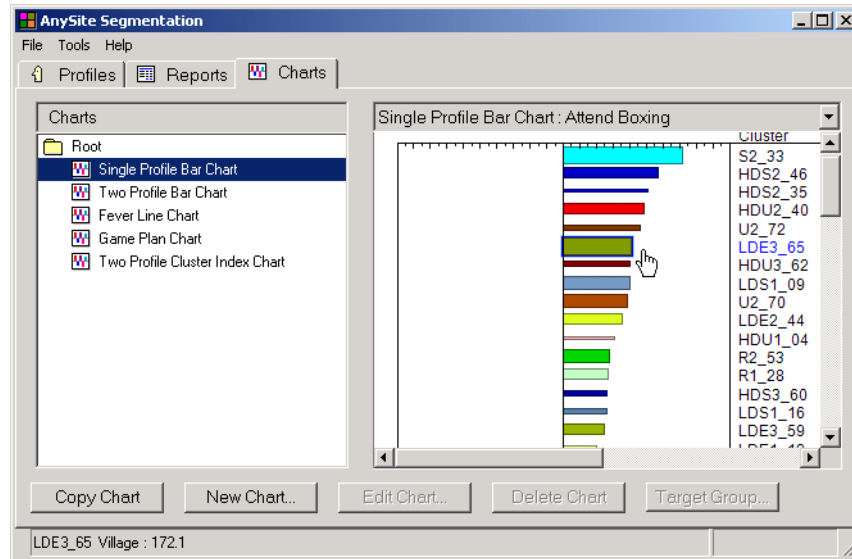
An index of 100 means that the reference and comparison profiles have the same proportion of clusters.

Single profile bar charts display the cluster index and the following information:

- **Cluster Count** – The height of each bar in the chart indicates the count of each cluster in the profile. This shows how well a cluster is represented in the sample. For example, a cluster with a very high index and a low count, shows that it is not well represented in the study area.
- **Cluster Groups** – The color of each bar indicates which cluster group the specific cluster belongs to. Clusters in the same group will have similar bar colors.
- **Additional Statistics** – Scrolling the window to the right shows more data related to the bar chart. This shows a table with the count, base count, index, and related proportions for the chart data.

As an example, consider a boxing event that wants to attract a larger audience. They could display a bar chart showing which clusters attend boxing events.

**Figure: Bar Chart Showing Boxing Attendance by Cluster**



Studying the chart, we see that there is a high penetration in the Suburban (S), High Density Suburban (HDS), Urban (U), and High Density Urban (HDU) clusters. Cluster LDE3\_65 could be a good market to investigate because it has a good market penetration, indicated by the width of the bar, and a large cluster count value, indicated by the bar height.

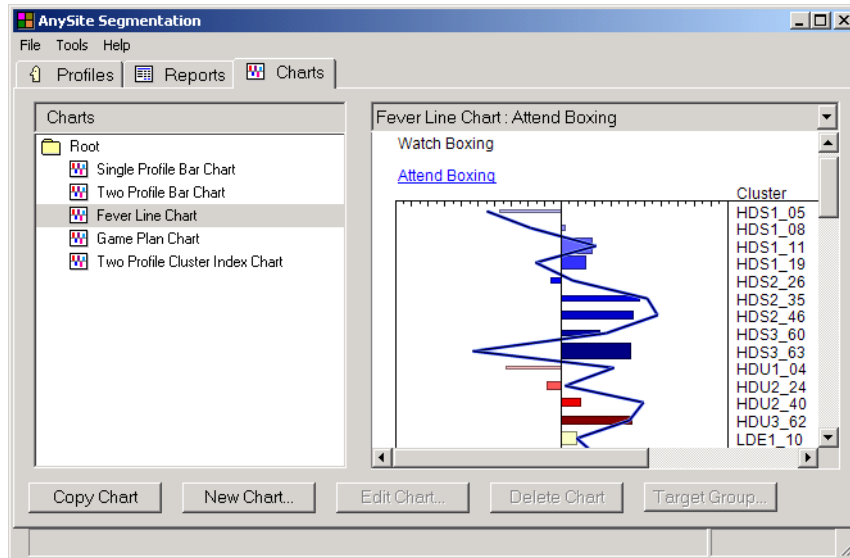
Moving the mouse pointer over the bar shows the cluster name, Village, and the index value, 172.1, in the status bar. Clicking on a bar opens a small window that describes the cluster it represents.



By default, the clusters are listed alphabetically.

As an example, consider a boxing event that wants a larger proportion of its audience to attend the event instead of watching it at home. They could display a fever line chart for the Watch Boxing profile that overlays the Attend Boxing profile.

**Figure: Fever Line Chart Showing Boxing Viewership (bars) and Attendance (line) by Cluster**



Studying the chart, we see that cluster HDS3\_63 over-indexes both profiles and has more members that attend boxing events than watch boxing events.

Moving the mouse pointer over the bar shows the cluster name, Help Wanted, and the index value, 173.2, for the Watch Boxing profile in the status bar. Clicking on a bar opens a small window that describes the cluster it represents.

Use the Fever Line Chart to display customer expenditure data along with your customer profile vector (where the bars in the chart represents customers and the fever line represents expenditures) or to compare two brands or products. Look for gaps in the chart where a bar spikes and the fever line does not to locate where one cluster outperforms another.

## Game Plan Chart

The game plan chart displays each cluster's index and percent composition values for a single profile. This chart is useful for analyzing a customer base, because it shows which clusters outperform others and which clusters have the bulk of customers.

**Note** Game Plan charts are also referred to as Battlegram charts.

This chart accounts for how likely people are to buy or use a product as well as how many customers represent that figure. For example, while a cluster may have a high potential to buy a product, this cluster may only represent 0.07% of your customer base. This may not be a worthwhile

## Standard Charts

cluster to target as the return on investment may not be large enough. The game plan chart allows you to identify which clusters have a high potential to buy a product and represent a large customer base.

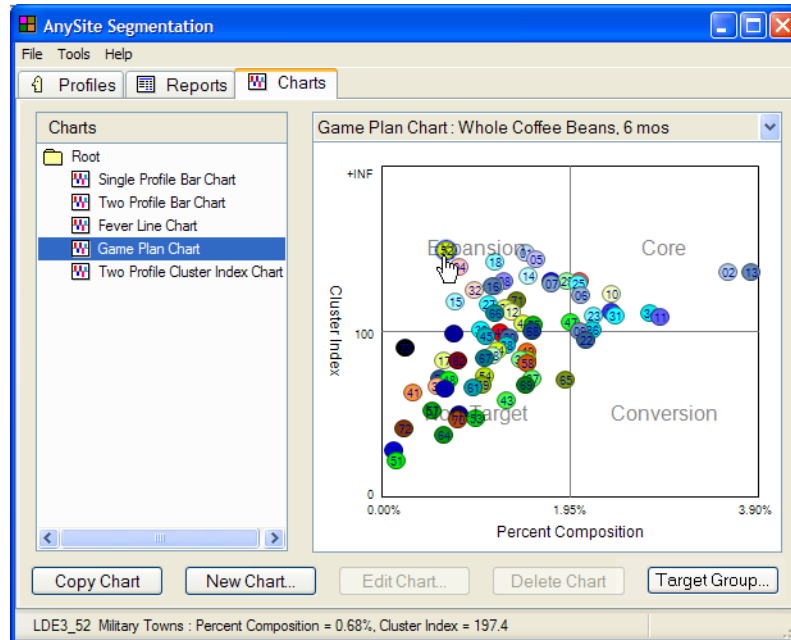
The composition percentage for a particular cluster is the percentage of all profile counts that are in a cluster. For example, if you had 2,000 buyers for a product and 200 of them were from the same cluster, then the composition percentage for that cluster would be 10%. The game plan chart displays composition percentages between 0 and the highest composition percentage in the profile. The composition percentage midpoint occurs at half of the highest composition percentage.

Game plan charts have the following quadrants:

Quadrant	Cluster Index	Percentage	Analysis
Core	Cluster Index > 100	Upper Half	<ul style="list-style-type: none"> <li>Highly likely to buy the product.</li> <li>Large percentage of customer base.</li> <li>Large percentage of market base.</li> <li>These are the best customers. They need to be maintained, and possibly targeted to increase the per-customer contribution.</li> </ul>
Expansion	Cluster Index > 100	Lower Half	<ul style="list-style-type: none"> <li>Highly likely to buy the product.</li> <li>Small percentage of customer base.</li> <li>Small percentage of market base.</li> <li>Target this group to increase customer base to aim for aggressive growth.</li> </ul>
Non-Target	Cluster Index < 100	Lower Half	<ul style="list-style-type: none"> <li>Unlikely to buy the product</li> <li>Small percentage of customer base.</li> <li>These are not target customers. They have a low likelihood to buy the product, and the return on investment would not be high even if they could be convinced to do so.</li> </ul>
Conversion	Cluster Index < 100	Upper Half	<ul style="list-style-type: none"> <li>Unlikely to buy the product</li> <li>Large percentage of customer base.</li> <li>Large percentage of market base.</li> <li>There are a lot of this type of people in your market that you need to convert to become customers.</li> <li>Invest in these customers to try and convert the households to core customers.</li> </ul>

As an example, consider a company that sells whole coffee beans. The company is looking for clusters to target with their new advertising campaign. To identify these clusters, the company creates a game plan chart using a profile of people who have purchased whole coffee beans in the past six months.

Figure: Game Plan Chart Showing Whole Coffee Bean Purchases in the Past Six Months



Studying the chart, we see several clusters in the Expansion quadrant that we could target. This quadrant shows clusters that are likely to purchase whole coffee beans, but currently do not. We see that cluster 52 has one of the highest index values and one of the lowest compositions. Moving the mouse pointer over this cluster shows the cluster name, Military Towns, the cluster's composition percentage, and the cluster's index value. Clicking on the cluster opens a small window that describes the cluster.

You can save the target group shown in a Game Plan Chart by clicking **Target Group**. See [Saving the Target Group from a Scatter Chart on page 65](#) for more information.

## Two Profile Cluster Index Chart

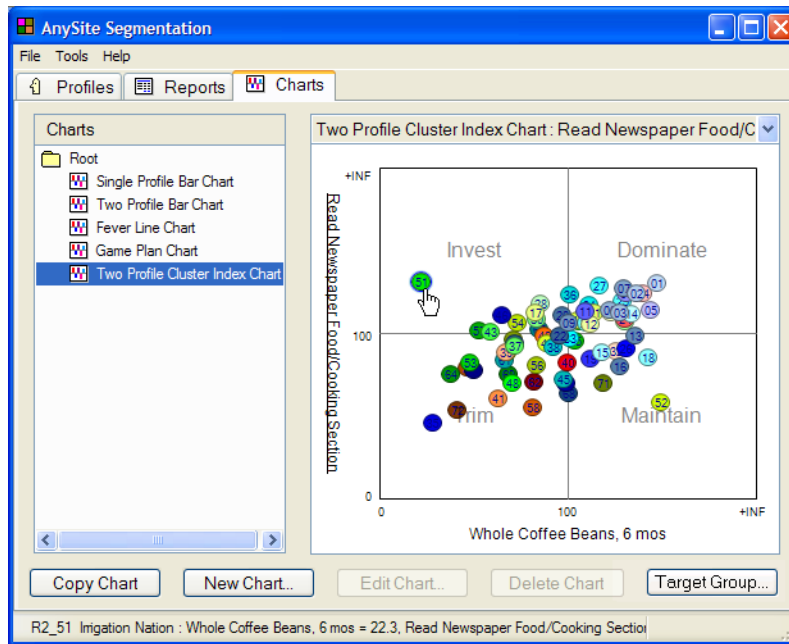
Two profile cluster index charts present each cluster's index values for two profiles in a simple chart.

Use two similar profiles to find where your competition outperforms you, or where you outperform the competition. Two profile cluster index charts have the following quadrants:

Quadrant	Vertical Profile	Horizontal Profile	Analysis
Dominate	Cluster Index > 100	Cluster Index > 100	These clusters are more than likely to buy your product than average, and they are well represented in your customer profile.
Invest	Cluster Index < 100	Cluster Index > 100	These clusters are more than likely to buy your product than average, but there are few of them in your customer profile. These clusters have potential to grow. Invest in these clusters to convert them to the Dominate quadrant.
Trim	Cluster Index < 100	Cluster Index < 100	These clusters are less than likely to buy your product than average and you do not have many of them in your customer base. Therefore you should reduce your marketing efforts to these clusters, because there is little potential.
Maintain	Cluster Index > 100	Cluster Index < 100	These clusters are less likely than average to buy your product, but you have more than average of these clusters in your customer list. You are doing better than you expected in these areas, but growth is limited. Therefore you need to maintain these customers.

As an example, consider a company that sells whole coffee beans. The company is starting a newspaper advertising campaign where they will place coupons in the Food sections of many local newspapers. They want to know which newspapers to include in their campaign. To determine this, they create a two profile cluster index chart that shows the index of coffee bean purchasers and newspaper readers.

**Figure: Two Profile Cluster Index Chart Comparing Newspaper Readership and Coffee Purchasers**



Studying the chart, cluster 51 stands out because they have a high index for the newspaper reading profile, but a low index for purchasing whole coffee beans. This could represent a new market that the coffee seller wants to enter. Moving the mouse pointer over the cluster, we see the cluster name, Irrigation Nation, and the index values. Clicking on the cluster opens a small window that describes the cluster.

You can save the target group shown in a Two Profile Cluster Index Chart by clicking **Target Group**. See [Saving the Target Group from a Scatter Chart on page 65](#) for more information.

## Viewing a Chart

To view a chart:

1. In the AnySite Segmentation UK window, select the **Profiles** tab.
2. Under the Profiles tab, select the profile you want to view with your chart.

3. In the AnySite Segmentation UK window, select the **Charts** tab.
4. Under the Charts tab, select the chart that you want to view. This displays the chart in the AnySite Segmentation UK window.
5. If the chart supports more than one profile, then select the second profile as follows:
  - a. If the chart is a bar chart, then the profiles appear above the chart. Click on the second profile. The second profile is now underlined.  
  
If the chart is a scatter plot, then the profiles are listed along each axis. Click on the second profile. The second profile is now underlined.
  - b. Under the Profiles tab, select the second profile that you want to use in the chart.
  - c. Select the **Charts** tab to view the chart with the second profile.

When viewing a chart, you can also perform the following actions:

- [Viewing Profile Information](#)
- [Viewing Cluster Information](#)
- [Viewing Other Profile Attributes from the Same Category](#)
- [Filtering Clusters](#)
- [Saving the Target Group from a Scatter Chart](#)

### Viewing Profile Information

When you are viewing a chart, you can move the mouse pointer over a bar or scatter plot point to see more information about the cluster. The additional information appears in the status bar. at the bottom of the AnySite Segmentation UK window. For examples of this, see [Standard Charts on page 56](#).

### Viewing Cluster Information

When you are viewing a chart, you can see more information about a particular cluster by clicking on the bar or scatter plot point. This opens a dialog that describes the cluster.

### Viewing Other Profile Attributes from the Same Category

When you are viewing a chart, you can quickly change the profile attributes for the chart. To do this:

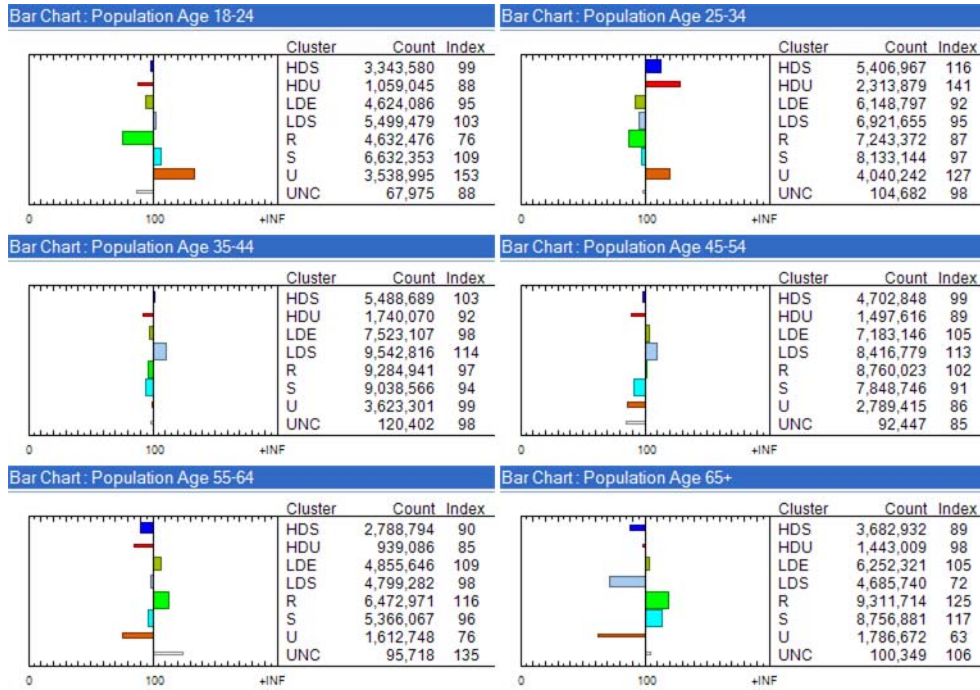
1. For charts that display multiple profiles, click on the profile name in the chart that you want to change. After clicking on the profile name, it will be underlined. This step does not apply to single profile charts.
2. Select the new profile attribute you want to see from the list above the chart.

The chart displays the new profile attribute.

You can also use this feature to quickly chart multiple profiles and compare them against each other. To do this, select a profile from the drop-down list above the report and then use the arrow keys or mouse scroll wheel to quickly change the profile.

The following figure shows a series of population profiles by cluster groups. Using this technique highlights trends in the data, such as the R (rural) cluster having an older population and the U (urban) cluster having a younger population.

**Figure: Sequence of Bar Charts Showing Population Profiles by Cluster Groups**



To change the profile attribute to an attribute in a different category, you must select the new category from under the Profiles tab. For more information on this process, see [Viewing a Chart on page 63](#).

## Filtering Clusters

AnySite Segmentation UK lets you specify criteria that affect which clusters appear in a chart. For more information on using this feature, see [Isolating and Aggregating Clusters on page 39](#).

## Saving the Target Group from a Scatter Chart

Both the Game Plan Chart and Two Profile Cluster Index Chart are scatter charts that display clusters by target groups. AnySite Segmentation UK lets you save a customized copy of the target group. You can add clusters to or remove clusters from a group to focus a report on only key

clusters, assign a display color to a group of clusters to view target clusters as a hotspot on a map, and show how a target group indexes for a different profile to determine the characteristics of the target group.

To modify and save the target group, click **Target Group** when viewing a Game Plan Chart or Two Profile Cluster Index Chart. This opens the Edit Target Group dialog. Follow the instructions from [step 3](#) under [Creating or Editing a Target Group on page 94](#) for more information about this dialog.

## Creating a Chart

If the standard charts do not meet your needs, then you can create a chart. To create a chart:

1. In the AnySite Segmentation UK window, select the **Charts** tab.
2. Under the Charts tab, click **New Chart**. This opens the New Chart dialog.
3. In the **Chart Name** field, enter the name for your new chart type. This name appears in the list of charts after you create the chart.
4. In the **Chart Type** field, select the type of chart that you want to create. Your choices are:
  - Bar Chart 1 – Displays attributes from a single profile as bars. The single profile bar chart is an example of this chart type.
  - Bar Chart 2 – Displays attributes from two profiles as bars. The two profile bar chart is an example of this chart type.
  - Bar Line Chart – Displays attributes from two profiles. One profile appears as bars and the other profile appears as a line that overlays the bars. The fever line chart is an example of this chart type.
  - Scatter Plot 1 – Displays two attributes from a single profile. The game plan chart is an example of this chart type.
  - Scatter Plot 2 – Displays the same attribute from two profiles. The two profile cluster index chart is an example of this chart type.
5. Enter the size of the chart in the **Chart Width** and **Chart Height** fields. To scale the chart to fit inside of the window, enter a value of **0**. If the chart includes a data table, then this size must be large enough to properly display the data table.
6. Select how you want the chart to use color from the **Color Scheme** list. Your choices are:
  - None – All data points in the chart will have the same color.
  - By Cluster Color – Each cluster in the chart will be represented by a different color. Clusters from the same group will have similar colors.
  - By Group Color – Clusters belonging to the same group will be represented by the same color in the chart.
7. Configure the chart. Each chart type has specific settings. For more information about configuring the chart, continue with the instruction under [Bar Chart Properties on page 67](#) or [Scatter Plot Properties on page 69](#).
8. Click **OK** to save your chart and close the dialog. Alternatively, you can click **Cancel** to close the dialog without changing the chart.

The chart appears in the My Projects folder at the bottom of the Charts list. See [Organizing the My Projects Folder on page 70](#) for more information on this folder.

## Bar Chart Properties

The following instructions assume that you are in the process of creating or editing a Bar Chart 1 chart. See [Creating a Chart on page 66](#) or [Editing a Chart on page 70](#) for more information.

Bar charts display the bar chart and additional profile data. To configure the properties for a bar chart:

1. Change the appearance of the chart by configuring the following options under the Bar Chart Information tab:

The screenshot shows a configuration window for a bar chart. It has two tabs: 'Bar Chart Information' (selected) and 'Bar Chart Columns'. Under the 'Bar Chart Information' tab, there are three dropdown menus and two checkboxes. The 'Bar Length Column' dropdown is set to 'Penetration Index'. The 'Bar Width Column' dropdown is set to 'Analysis Count'. The 'Sort Column' dropdown is set to 'Penetration Index', and the 'Descending' checkbox is checked. Below these are two more checkboxes: 'Consistent Bar Widths' and 'Landscape', both of which are checked.

- a. From the **Bar Length Column** list, select the profile attribute that the length of the bar represents.
- b. From the **Bar Width Column** list, select the attribute that the height of the bar represents.
- c. From the **Sort Column** list, select the attribute that determines the sort order of the bars in the chart.
- d. If you want to order the bars from the highest sort value to the lowest, then check the **Descending** check box. Otherwise, clear the check box.
- e. If you want to ensure that the size of each bar remains constant no matter how many clusters are presented in the chart data, then check the **Consistent Bar Widths** check box. If you do not check this box, then the chart will resize the bars to fill the height of the chart.
- f. If you want to display the chart using vertical bars instead of horizontal bars, then check the **Landscape** check box. Otherwise clear the check box. Landscape charts will not include chart columns.

## Creating a Chart

2. Change the appearance of the data table next to the bar chart by doing the following under the Bar Chart Columns tab:

	Profile Field	Column Title	Column Width	Alignment	Format
1	Cluster Code	Cluster	60	Left	
2	Analysis Count	Count	60	Right	#,0
3	Analysis Percent		40	Right	0.0P
4	Base Count	Base Count	90	Right	#,0
5	Base Percent		40	Right	0.0P
6	Penetration Perce		40	Right	0.0P
7	Penetration Index	Index	45	Center	0

Column Font Size: 9

- To change the settings for a column in the data table, modify its row in the grid. For information on formatting numeric values, see [Appendix A: Format Codes](#).
  - To add a column to the data table, click **Add**.
  - To remove a column from the data table, select its corresponding row in the grid and click **Remove**.
  - To change where a column appears in the data table, select its corresponding row in the grid and click **Up** or **Down** to change its position in the list. The first row in the grid is the leftmost column in the data table.
  - To change the data table font size, enter a size, in points, in the **Column Font Size** field.
- Note** The data table will not appear for landscape bar charts.
3. If you are configuring a Bar Chart 2 or Bar Line Chart, then you can select the second profile under the Second Profile tab. If you are configuring a Bar Chart 1, then skip this step.

Scatter Plot Information Second Profile

Default Profile: Read Newspaper Food/Cooking Section

- To select a second profile for the chart, click **Browse**. This opens the Select Profile dialog. In the dialog, select the profile you want to use in the chart.
4. Click **OK** to save your chart and close the dialog. Alternatively, you can click **Cancel** to close the dialog without changing the chart.

## Scatter Plot Properties

The following instructions assume that you are in the process of creating or editing a Bar Chart 1 chart. See [Creating a Chart on page 66](#) or [Editing a Chart on page 70](#) for more information.

Scatter plot charts show how profile data relates to other data from the same or a different profile. To configure the properties for a scatter plot chart:

1. Change the appearance of the chart by configuring the following options under the Scatter Plot Information tab:

The screenshot shows the 'Scatter Plot Information' dialog box with the following configuration:

- Chart Data:**
  - X-Axis: Analysis Percent
  - Y-Axis: Penetration Index
- Axis Labels:**
  - Percent Composition
  - Cluster Index
- Quadrant Descriptions:**
  - Expansion
  - Core
  - Non-Target
  - Conversion

- a. Select the profile attribute to appear on the horizontal axis from the **X-Axis Column** list.
  - b. Select the profile attribute to appear on the vertical axis from the **Y-Axis Column** list.
  - c. Enter the text you want to describe each axis in the **Axis Labels** fields.
  - d. Enter the text you want to appear in each quadrant in the **Quadrant Labels** fields.
2. If you are configuring a Scatter Plot 2 chart, then you can select the second profile under the Second Profile tab. If you are configuring a Scatter Plot 1 chart, then skip this step.

The screenshot shows the 'Scatter Plot Information' dialog box with the 'Second Profile' tab selected. The 'Default Profile' field contains the text 'Read Newspaper Food/Cooking Section' and there is a 'Browse' button to its right.

To select a second profile for the chart, click **Browse**. This opens the Select Profile dialog. In the dialog, select the profile you want to use in the chart.

3. Click **OK** to save your chart and close the dialog. Alternatively, you can click **Cancel** to close the dialog without changing the chart.

### Organizing the My Projects Folder

By default, user-created charts are all listed in the My Projects folder under the Charts tab. If you want to organize these folders in a hierarchy, then you can do so at the operating system level. To do this:

1. Create subdirectories under the segmentation directory.
2. Move the chart.xml files from the segmentation directory to the subdirectories.

The next time you start AnySite Segmentation UK, the charts will be organized according to the directory structure.

### Copying a Chart

AnySite Segmentation UK allows you to make copies of any chart. This is useful if you want to create many similar charts.

To copy a chart:

1. In the AnySite Segmentation UK window, select the **Charts** tab.
2. Under the Charts tab, select the chart you want to copy and click **Copy Chart**.

### Editing a Chart

AnySite Segmentation UK allows you to modify any chart in the My Projects folder. You cannot edit any of the standard charts, but you can create copies of them and then edit the copied charts.

To edit a chart:

1. In the AnySite Segmentation UK window, select the **Charts** tab.
2. Under the Charts tab, select the chart you want to edit and click **Edit Chart**. This opens the Edit Chart dialog.
3. In the Edit Chart dialog, make the changes that you require. This dialog is identical to the New Chart dialog. For information on using the dialog, see [Creating a Chart on page 66](#). For more information on configuring the properties for a specific type of chart, see [Bar Chart Properties on page 67](#) or [Scatter Plot Properties on page 69](#).
4. Click **OK** to save your changes to the chart. Alternatively, you can click **Cancel** to close the dialog without changing the chart.

## Deleting a Chart

AnySite Segmentation UK allows you to delete any chart in the My Projects folder. You cannot delete any of the standard charts.

To delete a chart:

1. In the AnySite Segmentation UK window, select the Charts tab.
2. Under the Charts tab, select the chart you want to delete and click **Delete Chart**.



# Integrating with AnySite

This chapter explains how to spatially use and analyze AnySite Segmentation UK data and results with the AnySite application.

## In this chapter:

- ◆ Using Profile Data with Thematic Layers .....74
- ◆ Using Profile Information with Dot Density Layers.....80
- ◆ Adding Profile Information to Reports .....81
- ◆ Using Segmentation Data with a Capture Method .....81
- ◆ Performing a Sister Store Analysis .....84

## Using Profile Data with Thematic Layers

In addition to viewing profile data in AnySite Segmentation UK reports and charts, you can overlay profile data on an AnySite map as a thematic layer. The following topics provide more information about working with thematic layers:

- [Standard Thematic Layers](#)
- [Creating Thematic Layers](#)
- [Applying Thematic Layers to a Map](#)
- [Customizing Thematic Ranges](#)

### Standard Thematic Layers

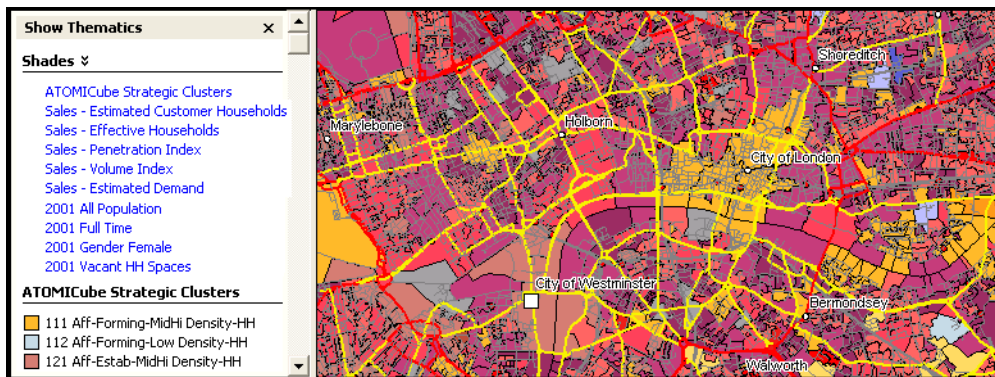
AnySite comes with several segmentation thematic maps that allow you to color-code specific information about your profile. You can create themes that shade geography by:

- [Clusters](#)
- [Estimated Customer Units](#)
- [Effective Customer Units](#)
- [Penetration Index](#)
- [Volume Index](#)
- [Estimated Demand](#)

#### Clusters

The cluster system name depends on the segmentation cluster system that you are using. Clicking on the cluster thematic shows the location of each cluster on the map.

Figure: Thematic Map Showing Clusters

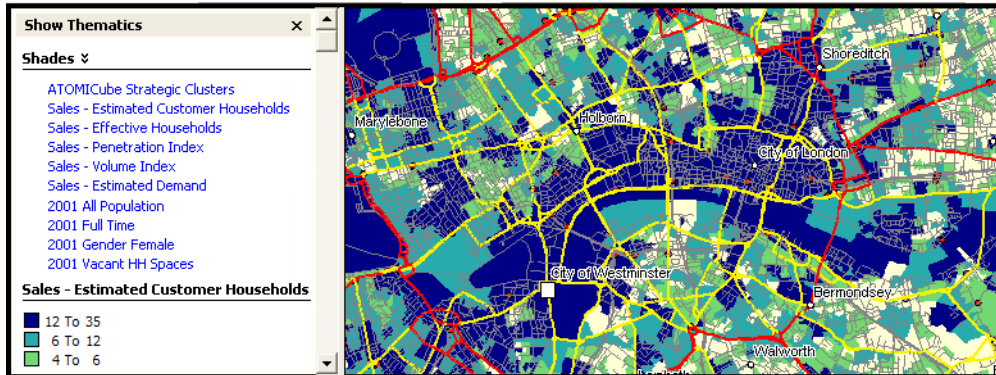


If you are using a cluster filter or target group, then this option will only show the filtered clusters or groups. For more information about filtering clusters, see [Isolating and Aggregating Clusters on page 39](#).

## Estimated Customer Units

This thematic layer shades the geography according to a range of the estimated customer unit values, where units is the base demographic of the profile, such as households.

**Figure: Thematic Map Showing Estimated Customer Households**



The number of estimated customer units is calculated by multiplying the base demographic size by the cluster's penetration percentage. The penetration percentage is based on the geography's assigned cluster code and the profile's cluster attribute.

For example, BlockGroup 123456 has a population of 200 households is associated with the Suburban Wave cluster. In the current profile, the Suburban Wave cluster has a penetration percent of 10%. The estimated customer households for the block group is 20 (10% of 200).

## Effective Customer Units

This thematic layer shades the geography according to a range of the effective customer unit values, where units is the base demographic of the profile, such as adult population.

**Figure: Thematic Map Showing Effective Customer Households**



The number of effective customer units is calculated by multiplying the base demographic size by the cluster's penetration index, divided by 100. The penetration index is based on the geography's assigned cluster code and the profile's cluster attribute.

For example, BlockGroup 654321 has an adult population of 500 and is associated with the Help Wanted cluster. In the current profile, this cluster has a penetration index of 80. The effective customer adult population for this block group is 400 ( $500 \times 80 / 100$ ).

### Penetration Index

This thematic layer shades the geography according to the penetration index values of the clusters in the profile.

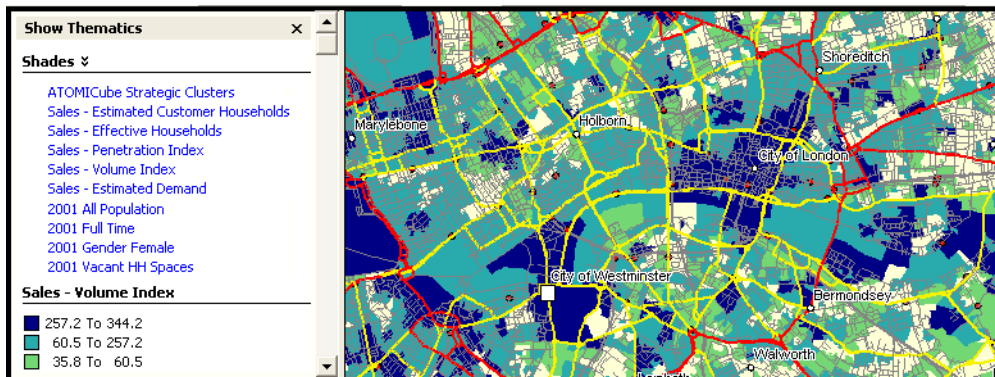
**Figure: Thematic Map Showing Penetration Indexes**



### Volume Index

This thematic layer shades the geography according to the volume index values of the clusters in the profile. This thematic layer is only available for profiles with volume data.

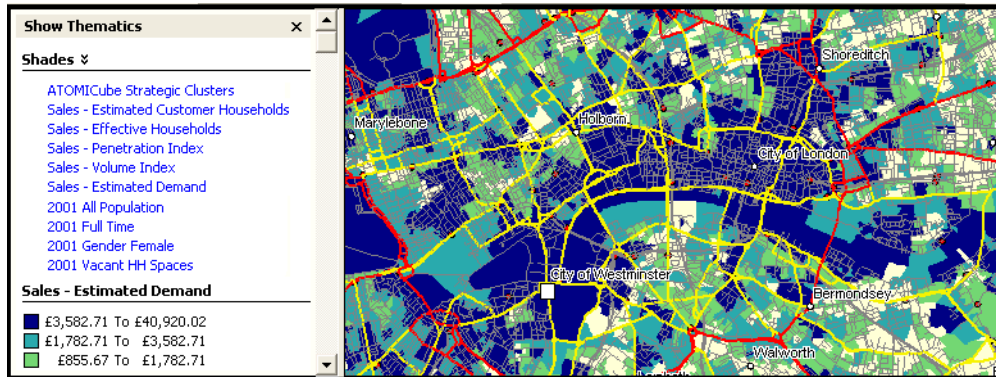
**Figure: Thematic Map Showing Volume Indexes**



### Estimated Demand

This thematic layer shades the geography according to the estimated demand for the clusters in the profile. This thematic layer is only available for profiles with volume data.

Figure: Thematic Map Showing Estimated Demand



The estimated demand for a geographic area is calculated by multiplying the geography's estimated customer units by its volume per unit. For more information on the estimated customer units calculation, see [Estimated Customer Units on page 75](#).

For example, BlockGroup 123456 has a population of 200 households is associated with the Suburban Wave cluster. The current profile also has the following data for the Suburban Wave cluster:

Cluster Name	Analysis Count	Base Count	Penetration	Index	Volume
Suburban Wave	10,000	100,000	10%	75	£250,000

From the profile, we calculate the volume per household as £25 (£250,000 / 10,000) and note that this cluster has a 10% penetration. From this information, we can calculate that the number of estimated customer households for the block group is 20 (10% of 200) and the estimated demand is £500 (20 customer households representing £25 each).

## Creating Thematic Layers

In addition to using the standard thematic layers, you can also use profile data to create a custom range shade. Creating range shades follows the same procedure for AnySite Segmentation UK profile data that it does for AnySite data, with the following differences:

- To use data from a standard AnySite Segmentation UK profile, select the profile as the data source in the Thematic dialog.
- To use data from a custom AnySite Segmentation UK profile, select User Defined Profiles as the data source.

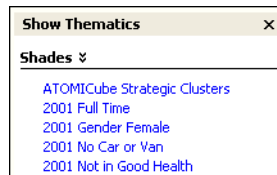
**Note** Not all segmentation systems include standard profiles. If the segmentation system you are working with does not, then you must create custom, user defined, profiles to work with.

For more information, see the AnySite documentation.

## Applying Thematic Layers to a Map

To create a segmentation thematic map:

1. In AnySite Segmentation UK, select a profile.
2. In AnySite, open the **Analysis** menu and select **Show Thematics**. This displays the Show Thematics side panel.



3. Click the Shades down arrow (▼) to see the available segmentation thematic map types. You will see the available segmentation thematic types in addition to the standard AnySite thematic options.
4. Select the thematic you want to apply to the current map.
5. AnySite adds the thematic layer to the map.

In addition to displaying a thematic map using the segmentation thematic maps available for the selected profile, you can also create new themes in the Configurator that use segmentation variables. These themes behave the same way as themes created with demographic variables. For more information on creating themes, see the AnySite documentation.

## Customizing Thematic Ranges

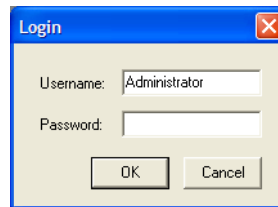
AnySite allows you to customize thematic ranges in the following ways:

- [Customizing Range Settings by Thematic Layer](#)
- [Customizing Range Templates](#)

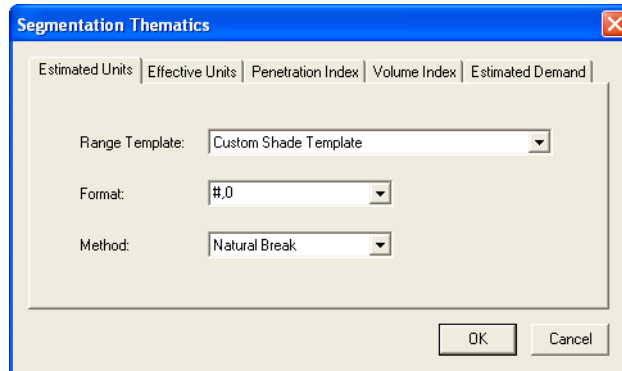
### Customizing Range Settings by Thematic Layer

You can specify the range settings for any of the calculated thematic layers described in [Standard Thematic Layers on page 74](#) using the AnySite Configurator. To do this:

1. In the Windows **Start** menu, select **All Programs > MapInfo > AnySite UK > AnySite Configurator**. This starts the AnySite Configurator.
2. Log into the AnySite Configurator as a user with Full Access permissions for AnySite Segmentation UK. Usernames are case sensitive. Click **OK** to proceed.



3. On AnySite Configuration menu, select **Tools > Segmentation Thematics**. This opens the Segmentation Thematics dialog. Each tab of this dialog configures the range settings for the corresponding type of thematic layer.



4. Complete the following for each thematic layer that you want to configure:
  - a. From the **Range Template** list, select the range template to use when presenting this thematic layer.
  - b. From the **Format** list, select the format code that suits the thematic data. If you cannot find an appropriate format code, then you can enter a format code in the field. For more information about format codes, see [Appendix A: Format Codes](#).

- c. From the **Method** list, select the method to use to determine the range sizes. The possible values are:

**Equal Count** – This method has the same number of records in each range.

**Equal Ranges** – This method divides the data records across ranges of equal size.

**Natural Break** – This method is a good way of displaying data that is not evenly distributed. The ranges are created using the average of each range. The average of each range is as close as possible to each of the range values in that range. This means the ranges are well-represented by their averages, and the data records within them are fairly close together.

**Standard Deviation** – This method creates the middle range break at the mean of your data. The ranges above and below the middle range are one standard deviation above or below the mean.

**Custom Ranges** – This method allows the AnySite user to enter their own range settings when they view the thematic layer.

5. Click **OK** to save your changes and close the dialog.

### Customizing Range Templates

Range templates specify the display settings for each range. Customizing the range templates follows the same procedure for AnySite Segmentation UK and AnySite thematic layers. For more information, see the AnySite documentation.

## Using Profile Information with Dot Density Layers

In addition to using the standard dot density layers, you can also use profile data to create a custom dot density layer. Creating dot densities follows the same procedure for AnySite Segmentation UK profile data that it does for AnySite data, with the following differences:

- To use data from a standard AnySite Segmentation UK profile, select the profile as the data source in the Thematic dialog.
- To use data from a custom AnySite Segmentation UK profile, select User Defined Profiles as the data source.

For more information, see the AnySite documentation.

## Adding Profile Information to Reports

After installing AnySite Segmentation UK, you can view summary reports using any of the packaged segmentation profiles. You can also include custom profiles in summary reports or create new reports using segmentation data.

Adding information to a report follows the same procedure for AnySite Segmentation UK profile data that it does for AnySite data, with the following differences:

- To use data from a standard AnySite Segmentation UK profile, select the profile from the **Available Report Items** list when defining the report.
- To use data from a custom AnySite Segmentation UK profile, select **User Defined Profiles** from the **Available Report Items** list when defining the report.

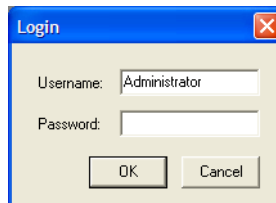
For more information, see the AnySite documentation.

## Using Segmentation Data with a Capture Method

AnySite capture methods allow you to create a study area based on your profile data. For example, you could create a study area that includes the nearest 1000 effective households to your store.

To create a capture method using custom profile data:

1. In the Windows **Start** menu, select **All Programs > MapInfo > AnySite UK > AnySite Configurator**. This starts the AnySite Configurator.
2. Log into the AnySite Configurator as a user with Full Access permissions for AnySite Segmentation UK. Usernames are case sensitive. Click **OK** to proceed.



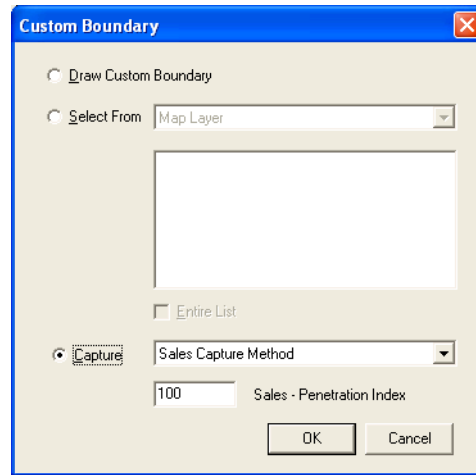
3. In AnySite Configurator, double-click **Capture Methods** and select **Standard**. This displays the available standard capture methods.
4. Click **New** to create a new standard capture method. This opens the Capture Method dialog.

5. Complete the Capture Method dialog as follows:

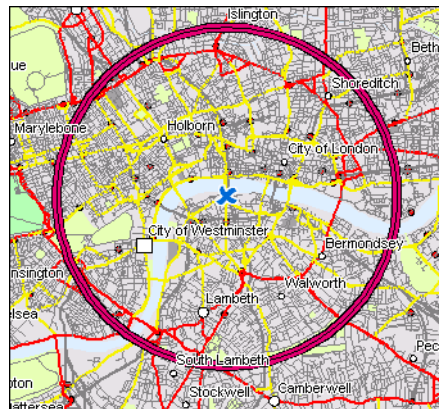
The screenshot shows the 'Capture Method' dialog box. The 'Name' field is set to 'Sales Capture Method'. Under 'Variable Settings', 'Data Source' is 'User Defined Profiles', 'Variable' is 'Sales - Penetration Index', 'Format' is '#,0.0', and 'Geography' is 'Postcode District'. Under 'Target Amount', the 'Total' radio button is selected with a value of 100 and 'Value'. The 'Percent' radio button is unselected with a value of 0 and '% Of' set to 'Count'. The 'Count' radio button is unselected with a value of 0 and 'Records'. Buttons for 'Advanced...', 'OK', and 'Cancel' are at the bottom.

- a. Enter the name for the capture method in the **Name** field.
- b. Select the segmentation profile you want to use in the capture method from the **Data Source** list. If you are using a custom profile, then select User Defined Profile here.
- c. Select the profile variable you want the capture method to use from the **Variable** list.
- d. Select the format code that suits the profile variable from the **Format** list. If you cannot find an appropriate format code, then you can enter a format code in the field. For more information about format codes, see [Appendix A: Format Codes](#).
- e. Select the appropriate level of detail to represent the profile data from the **Geography** list.
- f. Specify the appropriate criteria for the capture method under Target Amount. For more information on the available choices, see the AnySite documentation.
- g. Click **OK** to save the new capture method.

6. In AnySite, with a site already selected, on the **Study Area** menu, click **Draw Custom Boundary**. This opens the Custom Boundary dialog.



7. In the Custom Boundary dialog, select Capture, choose the capture method you created in **step 5**, and click **OK**. AnySite calculates the boundary using the capture method and draws the boundary on the map.



For more information about creating and using capture methods, see the AnySite documentation.

## Performing a Sister Store Analysis

A sister store analysis compares the profile of a single site (store and its trade area) to the profiles of all related sites (sister stores).

To perform a sister store analysis:

1. Create store trade areas using the sister store locations. If a store trade area, TAB file already exists, then skip this step.

Use AnySite's Batch Loader to generate trade areas for the sister stores and save them to a layer (they save as a TAB file). If creating ring or drive time trade areas, create a single ring or drive time. See [Creating a TAB file of Study Areas on page 85](#).

2. Create sister store profiles using the trade area TAB file.

See [Creating Sister Store Profiles in Segmentation on page 87](#).

3. Create a Profile Correlation Report using the sister store profiles.

See [Creating a Report in Chapter 5 on page 50](#). You can include extra columns in the report for data available in the original TAB file.

Select a base geography for the analysis. From the Segmentation **Tools** menu, click **Set Default Base Geography**. In the Select Default Base Geography dialog, select the geography and units to use, and then click **OK**.

4. Run AnySite to find a new site and generate a study area.

For instruction on how to add individual stores on to the AnySite map, refer to Finding a Site or to Place Site Tool in the *AnySite Reference*.

5. Display the new store's profile in Segmentation to view how it correlates to the existing stores.

To display the store's profile located in the Active Study Areas folder, click the profile from [step 3](#) and then click the correlation report.

The following is a sample report:

Pitney Bowes MapInfo® Profile Correlation Report 401 Huntington Beach Site	
30 October 2007	

Retailer	Rank Order Correlation	Annual Sales	Year Opened	Effective # Customers
5528 - MOORESTOWN S/C	0.58157**	785,892	2003	4,640
4205 - MT. GRAHAM SHP CTR	0.55481**	1,255,521	2000	3,397
2910 - PERRY PLAZA	0.50207**	546,855	1996	2,301
5744 - MADISON SQUARE S/C	0.42785**	1,074,486	2003	4,839
3369 - CHURCH HILL MALL	0.42571**	629,214	1998	2,689
5299 - BRACEY SHOPPING PLAZA	0.31641**	785,807	2003	4,421

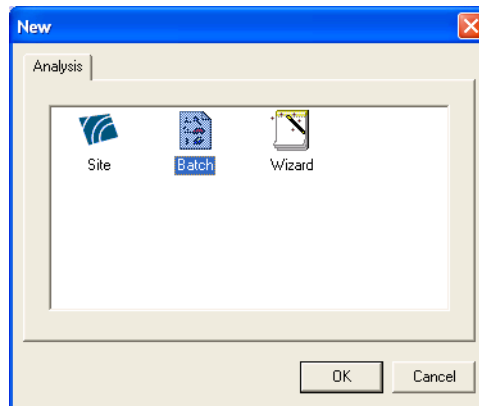
\*\* significance 0.01  
 \* significance 0.05

## Creating a TAB file of Study Areas

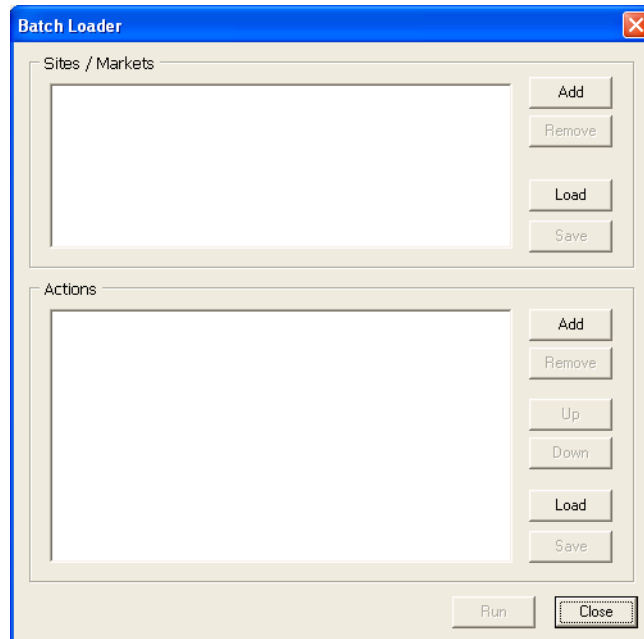
To add individual stores on to the AnySite map, refer to Finding a Site or to Place Custom Locations Tool in the *AnySite Reference*.

To add a table of store locations and trade areas (such as a drive time, ring, or custom boundary) to the AnySite map:

1. On the AnySite **File** menu, click **New**.
2. In the New dialog, select **Batch** then click **OK**.

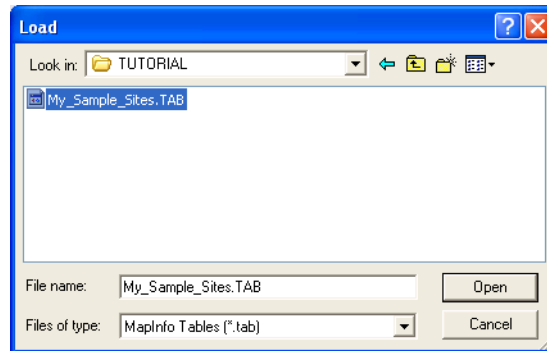


3. In the Sites/Markets section of the Batch Loader dialog, click **Load**.



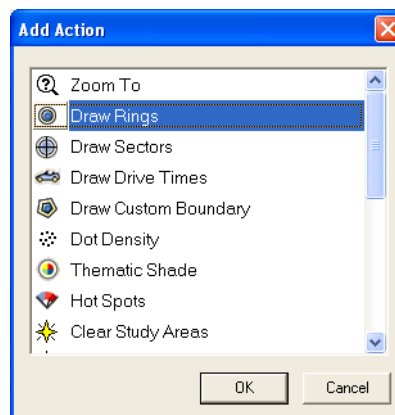
## Performing a Sister Store Analysis

4. In the Load dialog, select the file containing the sister store locations and then click **Open**.



The files display in the Sites/Markets section of the Batch Loader dialog.

5. In the Actions section of the Batch Loader dialog, click **Add**.
6. In the Add Action dialog, select the method of creating study areas (trade areas) for each location. Select to create a ring, a drive time, or custom boundaries. Click **OK**.



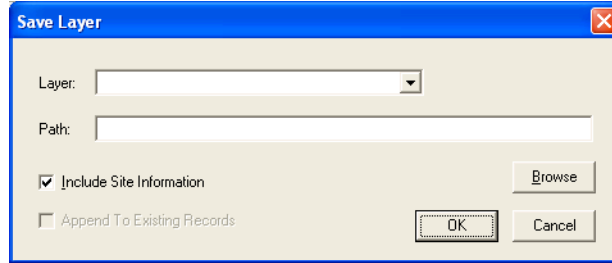
**Note** To make multiple selections in the Add Action dialog, press the **Ctrl** key while making selections.

7. In the dialog that displays for the study area from the previous step, make your study area selections and click **OK**.

The study area displays in the Actions list in the Batch Loader dialog.

8. In the Action section of the Batch Loader dialog, click **Add** to specify the layer to save stores to.
9. In the Add Action dialog, scroll through the list and select **Save Layer**. Click **OK**.

10. In the Save Layer dialog:



- a. Select the layer to save the sites to. For example, select AnySite - Rings if you are creating rings for stores.
- b. Click **Browse**.  
In the Output Path dialog, select a location to save the layer to from the **Save in** list. In the **File name** box, type the name of the file to save to. Click **Save**.
- c. Click **OK** to close the Save Layer dialog.

Your study area and Save Layer selections display in the Actions list in the Batch Loader dialog.

11. In the Batch Loader dialog, click **Run** to load the stores into AnySite and generate a study area for each store.

12. Click **Close**.

Continue with the instructions under [Creating Sister Store Profiles in Segmentation](#).

## Creating Sister Store Profiles in Segmentation

Before creating a sister store profile, you must have sister store locations with trade areas saved to an AnySite layer as described under [Creating a TAB file of Study Areas on page 85](#).

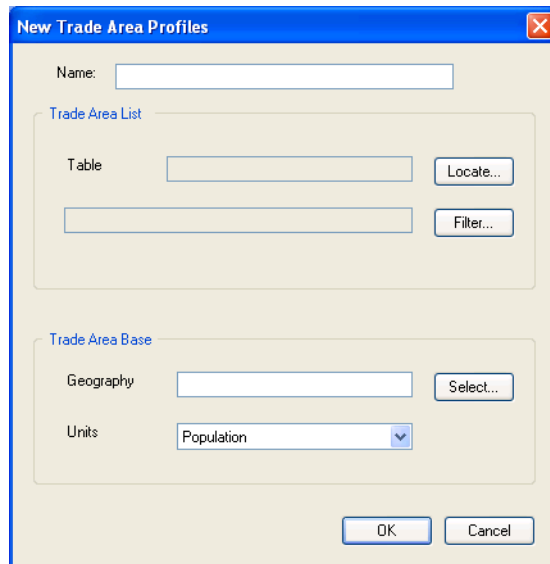
To add the sister stores as a profile in Segmentation:

1. Under the Profiles tab, click **New Profile**.
2. In the New Profile dialog, select **Trade Area Profiles** and click **OK**.

## Performing a Sister Store Analysis

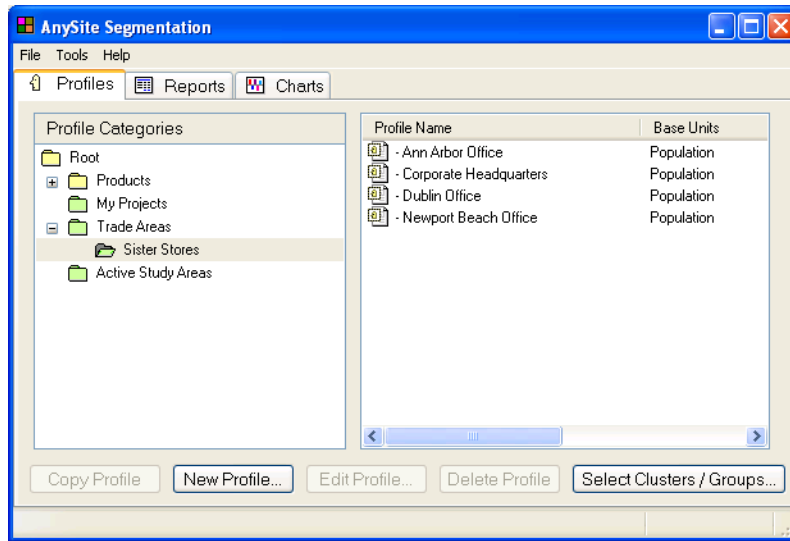
---

3. In the New Trade Area Profiles dialog, type a unique name box for the sister store profile in the **Name** box.



4. Click **Locate** to open the Locate Table dialog. Click Browse to locate the sister store layer file (created in [Creating a TAB file of Study Areas on page 85](#)), which is a \*.TAB file.  
From the **ID** and **Name** lists, select the ID and name columns for the sister store data.  
Click **OK** to return to the New Trade Area Profiles dialog.
5. Click **Select**, to open the Select Geography dialog. Select the geography to apply the profile to and click **OK**.
6. Click **OK** to close the New Trade Area Profiles dialog.

Your sister stores profile displays in the Profiles Categories list under Root > Trade Areas.





# AnySite Segmentation UK Tools

This chapter explains how to get started using AnySite Segmentation UK's features.

## In this chapter:

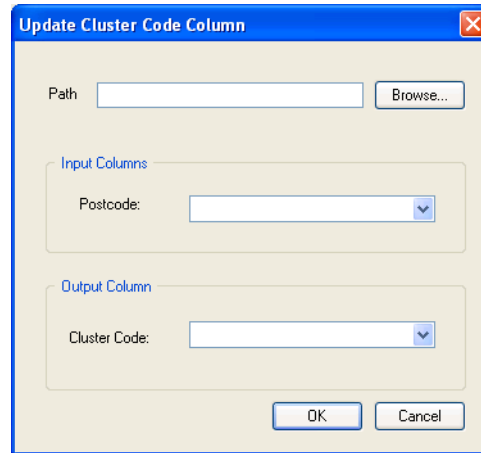
- ◆ **Updating Cluster Code Columns** .....92
- ◆ **Exporting and Importing Profile Data**.....92
- ◆ **Managing Target Groups** .....94

# Updating Cluster Code Columns

The Update Cluster Code Column tool adds cluster information to your customer data file. This allows you to make use of the cluster information in your other business applications.

To use this tool:

1. On AnySite Segmentation UK menu, select **Tools > Update Cluster Code Column**. This opens the Update Cluster Code Column dialog.



2. In the Path field, enter the path and filename of the .dbf or .tab file. You can also click **Browse** and find the file on the computer.
3. Under Input Columns, select the column that contains the information AnySite Segmentation UK can use to associate each row with a cluster. Select the column you want to use:
  - Post Code – AnySite Segmentation UK will determine which BlockGroup is most representative of this Post Code and then add the cluster code that is associated with that BlockGroup to the file.
4. Under Output Column, select the column where you want to save the cluster code for each row. If the file does not have a column named PSYTE\_CODE, then the tool will offer to create a column with that name and store the cluster codes there.
5. Click **OK** to add cluster information to the file according to your specifications.

## Exporting and Importing Profile Data

AnySite Segmentation UK offers export and import tools. The following topics describe these tools in more detail:

- [Exporting Profile Data](#)
- [Importing Profile Data](#)

## Exporting Profile Data

When you export profile data, AnySite Segmentation UK creates a file with the cluster code, count, base count, and volume data from the profile.

To export data from a profile:

1. On AnySite Segmentation UK menu, select **Tools > Export Profile**. This opens the Export Profile dialog.
2. In the Export Profile dialog, enter the file name you want to save the profile data to and select the data's format. You can save profiles as Excel spreadsheet or dBASE DBF files.
3. Click **Save** to save the profile data.

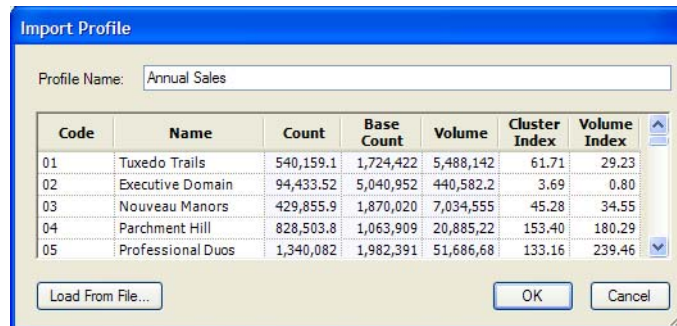
## Importing Profile Data

You can import profile data from either Excel spreadsheet or dBASE DBF files. To successfully import data, the data must be organized in columns named CLUSTER, COUNT, BASECOUNT, and VOLUME. The data file must contain all four of these columns.

If you are importing data from an Excel spreadsheet, then the first row of the spreadsheet must use column names as column headings, in order. The data in the spreadsheet cannot contain any formulas.

To import data into a profile:

1. On AnySite Segmentation UK menu, select **Tools > Import Profile**. This opens the Import Profile dialog.



2. In the Import Profile dialog, click **Load From File** to open the Load Profile dialog.
3. In the Load Profile dialog, navigate to the file you are importing the data from. Click **Open** to load the data.
4. In the Import Profile dialog, review the data. Modify the data as necessary in the grid.
5. Enter a name for the profile in the Profile Name field at the top of the dialog.
6. Click **OK** to save the profile data.

# Managing Target Groups

By default, PSYTE Advantage clusters are grouped by their settlement types. AnySite Segmentation UK uses these groups in reports and charts to organize aggregate statistics. For example, reports can provide summary statistics by group, in addition to the statistics for each cluster in a group. Similarly, charts use similar colors for clusters within the same groups to highlight similarities within a group.

AnySite Segmentation UK allows you to create your own cluster organization system using the Target Group Manager. See the following topics for more information:

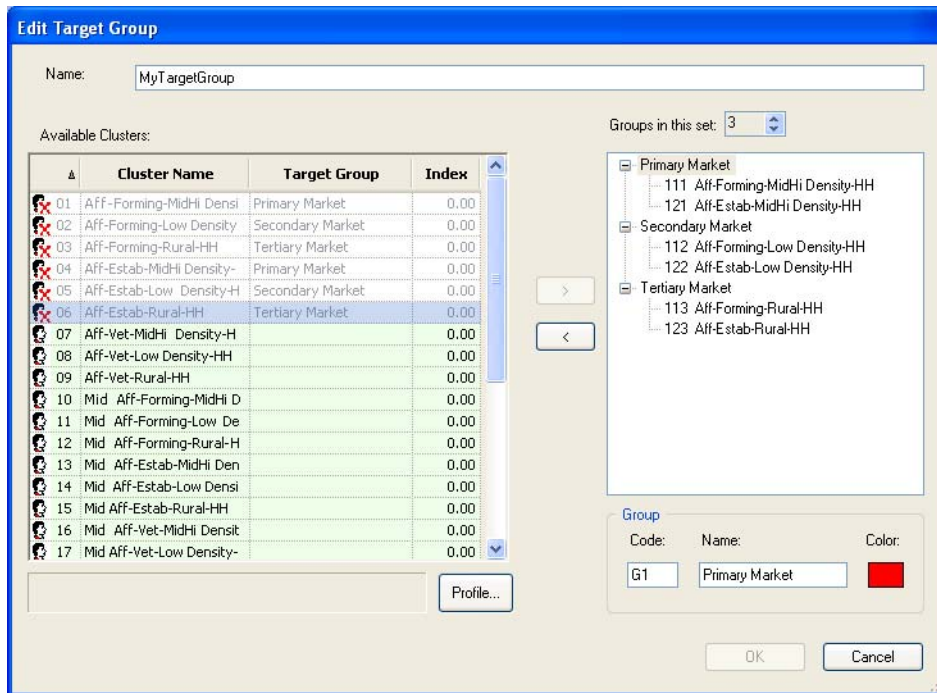
- [Creating or Editing a Target Group](#)
- [Copying a Target Group](#)
- [Deleting a Grouping](#)

## Creating or Editing a Target Group

The Target Group Manager creates and edits target groups. You must have profiles available to work with before creating a target group. If your data does not come with predefined profiles, see [Using Profiles in Chapter 4 on page 25](#) for instructions on how to create a profile.

To create or edit a target group:

1. On AnySite Segmentation UK menu, select **Tools > Target Group Manager**. This opens the Target Group Manager dialog.
2. In the dialog, do one of the following:
  - To create a new group, click **New**.
  - To edit an existing group, select a group from the list and click **Edit**.  
This opens the Edit Target Group dialog.



3. Enter a name for the group in the **Name** field.
4. Define the number of groups by clicking the **Groups in this set** arrows. When you reduce the number of groups, the dialog removes groups from the bottom of the list.
 

**Note** If the last group in the list has clusters in it and you reduce the number of groups, then those clusters will be removed from the group and the group is deleted from the list.
5. Set the properties for each group by selecting the group and then entering its code and name in the Group section of the dialog. Selecting a color for the group distinguishes one group's clusters from another in charts.
6. Assign clusters to a group by doing the following:

- a. Select the clusters you want to assign in the **Available Clusters** list. You can select multiple clusters by holding down the Ctrl key as you select each cluster. To select a continuous block of clusters, select the first cluster, hold down the Shift key, and then select the last cluster in the block.
- b. Select the group you are assigning the clusters to in the group list.
- c. Click > to move the selected clusters into the selected group.

**Note** You must assign all clusters before you can save the grouping.

Remove clusters from a group by selecting them in the group list and clicking <. All clusters must be assigned to a group. After removing clusters from a group, re-assign them to a new or different group in the list.

7. Show how the target groups index to a different profile, by clicking **Profile**. In the Select Profile dialog, click on the profile to index the target groups to and click **OK**.

8. In the Edit Target Group dialog, click **OK** to save the grouping and close the dialog.

**Note** All clusters must be assigned to a group before the OK button enables.

For information on using this target group with reports and charts, see [Isolating and Aggregating Clusters on page 39](#).

## Copying a Target Group

To make a copy of an existing target group:

1. On AnySite Segmentation UK menu, select **Tools > Target Group Manager**. This opens the Target Group Manager dialog.
2. In the dialog, select the group you want to copy and click **Copy**. This opens the Edit Target Group dialog.
3. Enter a new name for the target group in the **Name** field.
4. Make any changes you require to the target group. See [Creating or Editing a Target Group on page 94](#) for more information on doing this.
5. Click **OK** to finish copying the target group.

For information on using this target group with reports and charts, see [Isolating and Aggregating Clusters on page 39](#).

## Deleting a Grouping

To delete a target group:

1. On AnySite Segmentation UK menu, select **Tools > Target Group Manager**. This opens the Target Group Manager dialog.
2. In the dialog, select the group you want to remove and click **Delete**.
3. Confirm that you want to remove this group by clicking **Yes**.

If you removed the currently selected target group, then note that reports and charts will still use the target group. In this case, you should change the current target group. For more information, see [Isolating and Aggregating Clusters on page 39](#).

# Format Codes

AnySite Segmentation UK reports and charts support format codes that allow you to control how AnySite Segmentation UK displays numeric data.

## In this appendix:

- ◆ **Specifying a Format** .....98
- ◆ **Examples** .....98

## Specifying a Format

When you create or edit charts and reports, you can specify any of the following format codes.

Format Code	Effect
#	Inserts a numeric value.
0	Inserts 0 as a placeholder. The effect of this character is similar to #, except it always includes values of 0 at the beginning of the number or at the end, after a decimal place.
.	Separates the integer and decimal portions of the format specification. This allows you to specify one format for the integer portion and another for the decimal.
,	Uses a comma to separate the thousands, millions, and billions components of the value. For example, 12345 would appear as 12,345. You must specify # or 0 on both sides of the comma when you use this format character.
P	Multiplies the value by 100. This is useful for presenting percentage values. For example, 0.1234 would appear as 12.34.
%	Multiplies the value by 100 and appends a percent sign at the end of the result. For example, 0.1234 would appear as 12.34%.
£	Includes a pound currency symbol in the result.

## Examples

The following table demonstrates the effect of a variety of format strings.

Format	Original Value	Resulting Value
# Show integer values only.	123	123
	1.23	1
	0	
0 Show integer values only and include	123	123
	1.23	1
	0	0

Format	Original Value	Resulting Value
<b>###</b> Show number, rounded to two decimal places.	1.23	1.23
	1.234	1.23
	12.3	12.3
	0.123	.123
<b>#.00</b> Show number, rounded to two decimal places with placeholders to the right of the decimal point.	12.3	12.30
	0.123	.123
<b>0.00</b> Show number, rounded to two decimal places with placeholders before and after the decimal point.	12.3	12.30
	0.123	0.123
<b>#, #</b> Separate the number with a comma. Since there is no decimal point in the format, only the integer part of the number is shown.	123	123
	1234	1,234
	123456.789	123,456
<b>#, #.00</b> Separate the number with a comma and show two decimal places with a placeholder, if necessary.	123	123.00
	1234	1,234.00
	123456.789	123,456.79
<b>#P</b> Multiply the number by 100 and show the result as an integer.	0.00123	
	0.123	12
	1.23456	123
<b>0.00P</b> Multiply the number by 100 and show the result with two decimal places using a placeholder 0 if necessary.	0.00123	0.12
	0.123	12.30
	1.23456	123.46
<b>0.0%</b> Shows the result as a percentage with one decimal place and a percent sign.	0.1234	12.3%
<b>£#, #.00</b> Shows the number in pounds, with a comma separator and two decimal places.	123456.78	£123,456.78



# Troubleshooting

This section lists how to troubleshoot issues running Segmentation.

## In this appendix:

- ◆ Messages .....102
- ◆ Installation and Startup .....104

## Messages

This section describes the following error or warning messages:

- **An unhandled exception has occurred.**
- **Cannot load rangetemplate for thematic.**
- **Geolevel not found (ST)**
- **Input string was not in a correct format.**
- **Please setup segmenation configuration before running application.**
- **Set Path to AnySite.ini File**

### **An unhandled exception has occurred.**

When segmentation profiles are not licensed, an unhandled exception message displays. Installing the AnySite Segmentation UK installs a new license file to the ASDE directory. The path to the new license file must be set in the Configurator to work with the segmentation profiles.

Close AnySite Segmentation UK and launch the Configurator to set the path to the new license file. Follow the instructions in [Specifying ASDE Settings in Chapter 2 on page 14](#). After changing settings in the Configurator, launch AnySite Segmentation UK.

### **Cannot load rangetemplate for thematic.**

A thematic range shade must be set to view a Segmentation profile as a thematic on the AnySite map. If a range shade is not set, then a "Cannot load rangetemplate for thematic." message displays.

To set the thematic range shade for profiles, follow the instructions under [Setting Thematic Range Shades for Profiles in Chapter 2 on page 17](#).

### **Geolevel not found (ST)**

If the AnySite Data Engine (ASDE) path is not correctly set to the segmentation data, then a notice dialog displays with a "Geolovel not found (ST)" message.

Close AnySite Segmentation UK and launch the Configurator to set the correct path to the segmentation data. Follow the instructions in [Specifying ASDE Settings in Chapter 2 on page 14](#). After changing settings in the Configurator, launch AnySite Segmentation UK.

## Input string was not in a correct format.

An "Input string was not in a correct format." message displays when importing a Microsoft Excel spreadsheet that contains formulas into AnySite Segmentation UK.

To import a spreadsheet that contains formulas:

1. Make a copy of the spreadsheet.
2. In the copy, convert all calculations into values.

In Microsoft Excel, copy the cell or cell range that contain formulas and then paste them back using the Values Only paste option. For detailed instructions on how to do this, refer to Microsoft Excel's online help for replacing a formula with its value.

3. Save the spreadsheet, and then import it into AnySite Segmentation UK.

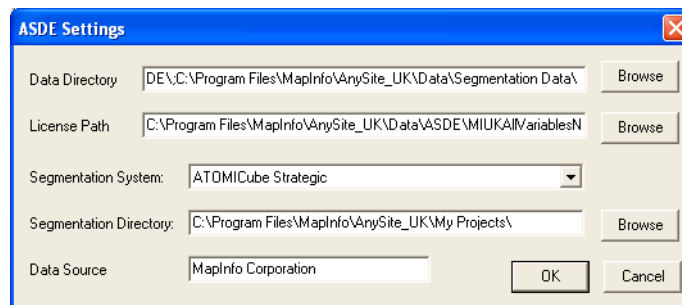
## Please setup segmenation configuration before running application.


When launching Segmentation, a message to set up the segmentation configuration displays if the segmentation system is not specified in the Configurator. The message that displays is:

ANYSITE.INI missing ASDE setting for Segmenation System. Please setup segmenation configuration before running application.

If you see this message:

1. Launch the Configurator.
  1. On AnySite Configurator menu, select **Tools > ASDE Settings**. This opens the ASDE Settings dialog.
  2. In the **Segmentation System** list, select the segmentation system that you are going to use.



3. Launch Segmentation. On the AnySite toolbar, click the Segmentation tool . This opens the AnySite Segmentation UK window.

### Set Path to AnySite.ini File

When launching the Data Vending tool, if a message displays prompting you to set the path to the AnySite.ini file, then do the following in the Set Path to AnySite.ini File dialog:

1. Click **Browse** to set the AnySite.ini file location. It is located in the AnySite installation directory (C:\Program Files\MapInfo\AnySite\_UK for example).
2. Click **Browse** to set the default output path. Set it to the My Projects folder in the AnySite installation directory (C:\Program Files\MapInfo\AnySite\_UK\My Projects for example).
3. Click **Apply**.

## Installation and Startup

### There are no Profiles in the Profile Categories List

There are no profiles listed under the Root folder in the Profile Categories list, when either the ASDE License Path points to a license file that does not license the Segmentation data or the segmentation system does not include standard (pre-set) profiles.

To point the ASDE License Path to the correct license file that was installed with your AnySite Segmentation UK, follow the instructions in [Specifying ASDE Settings in Chapter 2 on page 14](#).

To create profiles, because your segmentation system does not include standard profiles, follow the instructions in [Using Profiles in Chapter 4 on page 25](#).

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