Market Insight

Base Standard Module

Training Manual v3.1

D&B Market Insight

Base Standard Module

Manual Version: 3.1

Software Version: 2019 Q1

System: Training (UK & Europe)

Contents

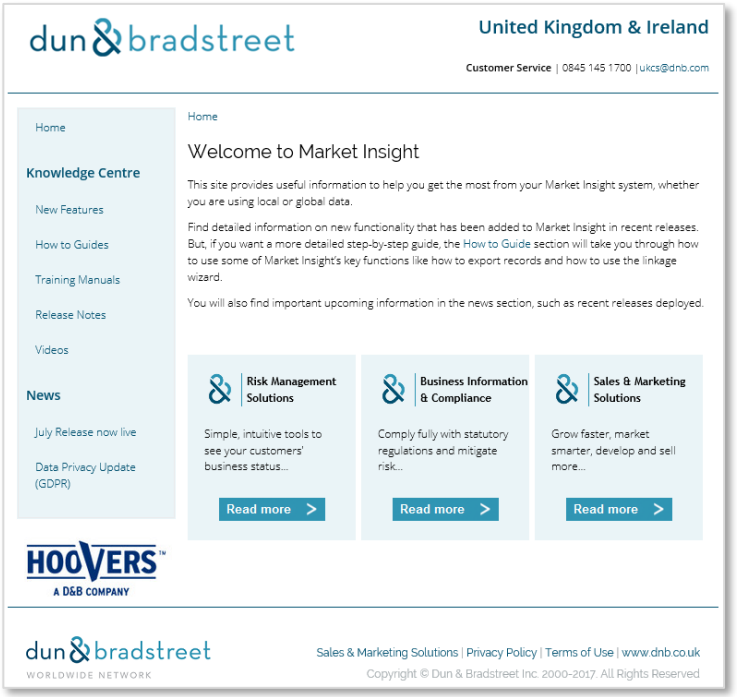
Introduction

Market Insight provides powerful and interactive marketing analysis of customer data overlaid on a D&B data universe. The system is web based with a truly easy to use Windows interface. Using a consistent and intuitive "drag and drop" approach throughout, every action automatically results in a query that can be saved and reused with ease. With a wide range of descriptive and predictive analytical tools, Market Insight's analysis options are virtually unlimited as any technique can be applied to any results in any order. Market Insight provides a unique combination of speed, power and accessibility for data exploration and understanding.

Market Insight holds your data overlaid on a D&B universe. This enables you to accurately measure your customer data in proportion to the opportunities in the market place. Hence the product's name: it enables insight of your activities in comparison to the market place rather than just within your business.

The D&B data universe in your Market Insight system will be adjusted to suit your licensing and measurement requirements. Your customer data is loaded from extract file(s) you provide and although this process allows for some cleaning and manipulation of the data, what you see within Market Insight is a reflection of the data you provide.

The Market Insight view of the data is a snapshot at the time that the data was loaded. Market Insight is an analytical system able to provide insight and understanding but it can also provide data feeds to your operational marketing systems to implement your targeting decisions.



Market Insight Splash Screen – D&B Website

N.B. The counts and figures in this manual may differ to those seen when you use this system as the data changes over time. Not all the functionality shown in this manual may be available in the system you are using.

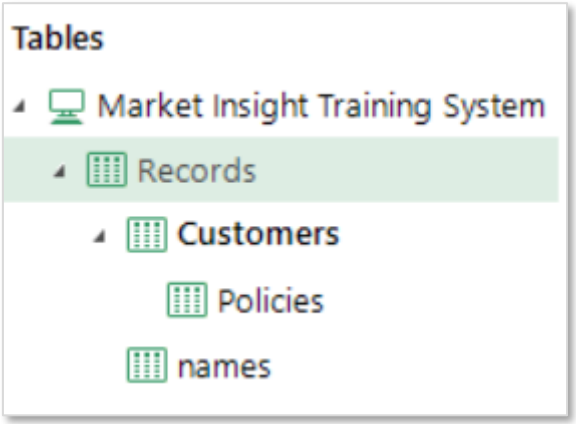
N.B. Where suitable variables are not available in the Market Insight Training system, the data of a holiday company has been used to provide the examples.

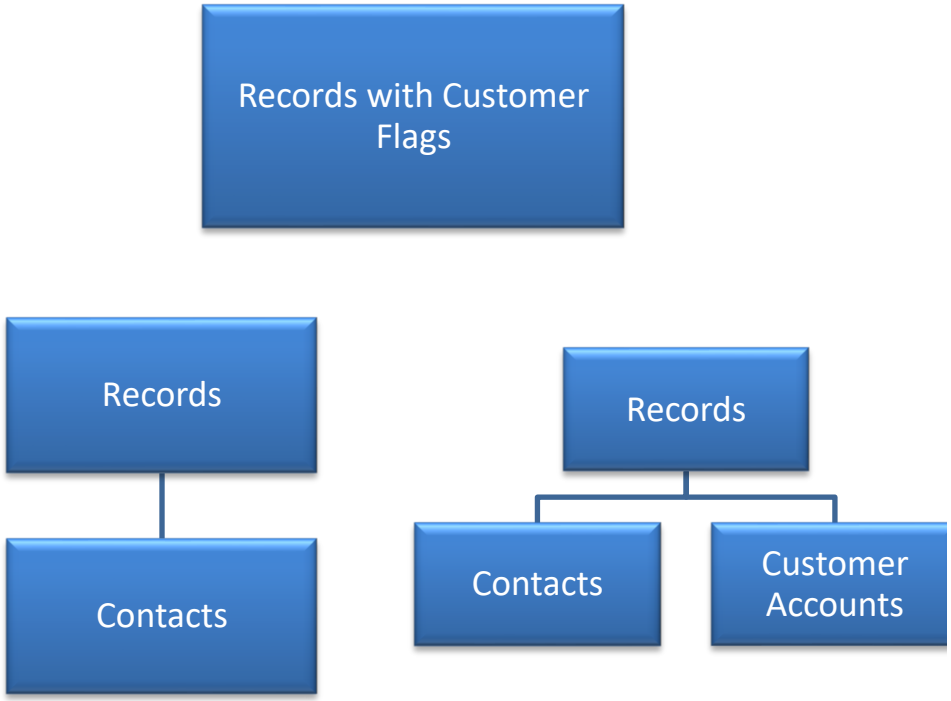
Data Structure

The structure of your Market Insight system can vary. The elements shown here are typical – each Record may be simply flagged with Customer data or can have many related Names. A Record may also have many matched Customer Accounts. The data loaded for each matched Customer Account is configurable – for example you may have multiple Transactions or Divisional Summaries or Product Summaries etc.

The detail present on each table of data depends on the Market Insight administrator. The data is arranged into folders to assist the user to navigate and find data items.

The structure used in the Training System, illustrated in this manual, uses a simple structure that has Records (organisations) with Names (contacts at the organisation). Also a subset of the Records called Customers (the User's customers) is held with a related table Policies (activity of the User's customers).





Accessing Market Insight

The Market Insight software is downloaded automatically to your PC when you click a link to launch the system. Once the software has been downloaded, it will automatically update from the server whenever necessary. You will normally receive a welcome email with details of this process.

To access Market Insight you need:

- Windows PC – Market Insight is a Windows.NET application that combines the best of the Windows interface with web based systems. Market Insight is not available on Mac or UNIX computers

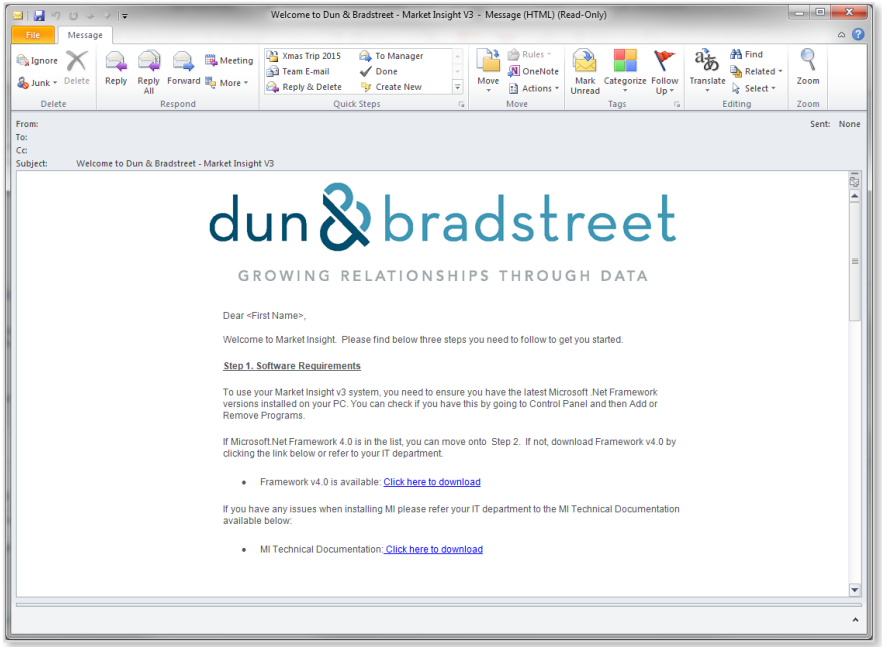
- The latest Windows.NET framework version installed. This can be obtained by visiting www.windowsupdate.com or from your IT team

To launch your Market Insight system, use a browser to view:

https://www.dnbmi.com/disco_systems/v3/new/milauncher.msi

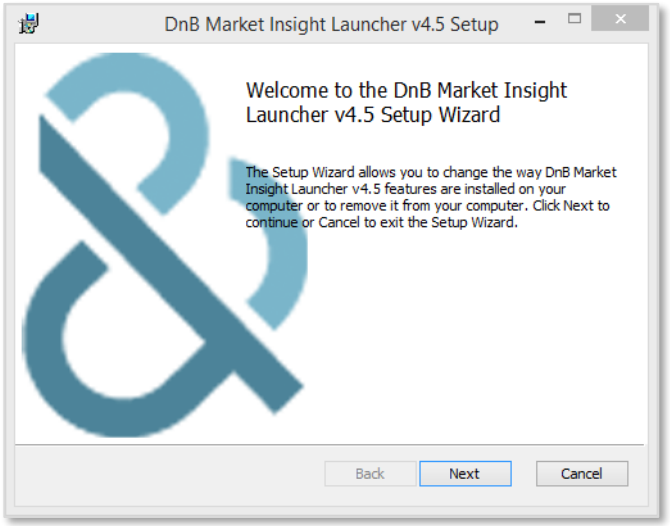
Alternatively use the links within your welcome email.

N.B. The “https” prefix, which establishes a secure connection between your browser and the D&B Server.



Welcome to D&B – Market Insight V3 Email

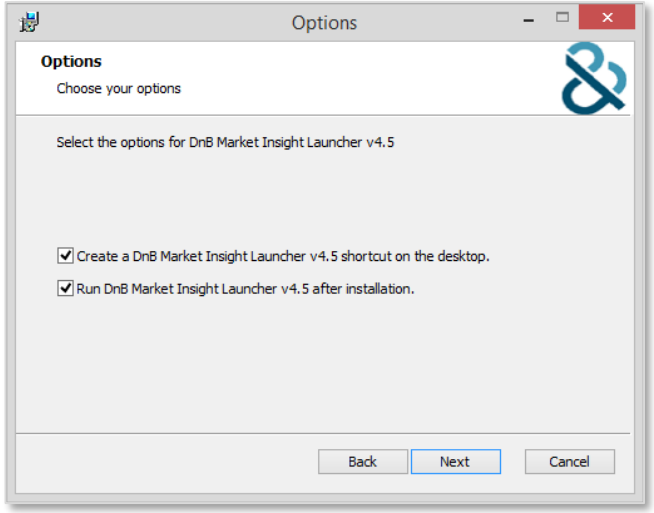
- Navigate to where you saved the downloaded file and double click it. Agree to run when prompted, and then follow the on screen instructions



Launcher Setup Wizard

- The installation process will result in an icon on your desktop and in a D&B Start Menu folder

- On subsequent uses of Market Insight, you can simply double click this icon. The software will automatically update from the D&B server whenever new releases are made available



Options

- You can install Market Insight on as many computers as you wish – it is your user id that controls your access. This means, for example, you can use Market Insight when working from home

How to Login

To use Market Insight, you need to have an Internet connection.

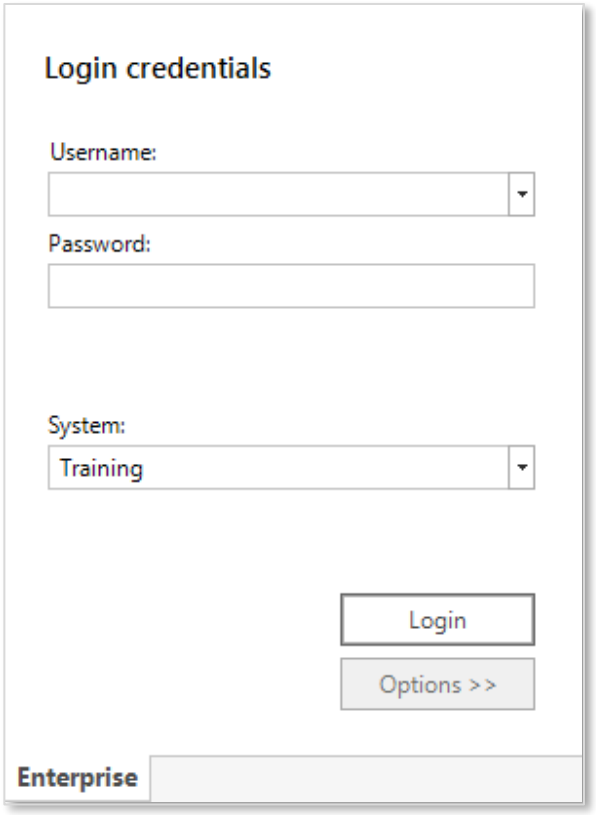
Start Market Insight by:

- Clicking on the **Market Insight** icon on your desktop, or by navigating to the program using Windows Explorer

In the upper left hand corner of the screen you will see a Login window that gives you the opportunity to connect to a Market Insight system containing data available to you for analysis.

Enterprise Tab

Your Market Insight system operates on a secure and resilient web connected server enabling you to access the system from any location with an Internet connection. A number of users may access the system at the same time, each of whom is authorised by a user account and password. Your Market Insight Administrator will provide you with a Username and Password.

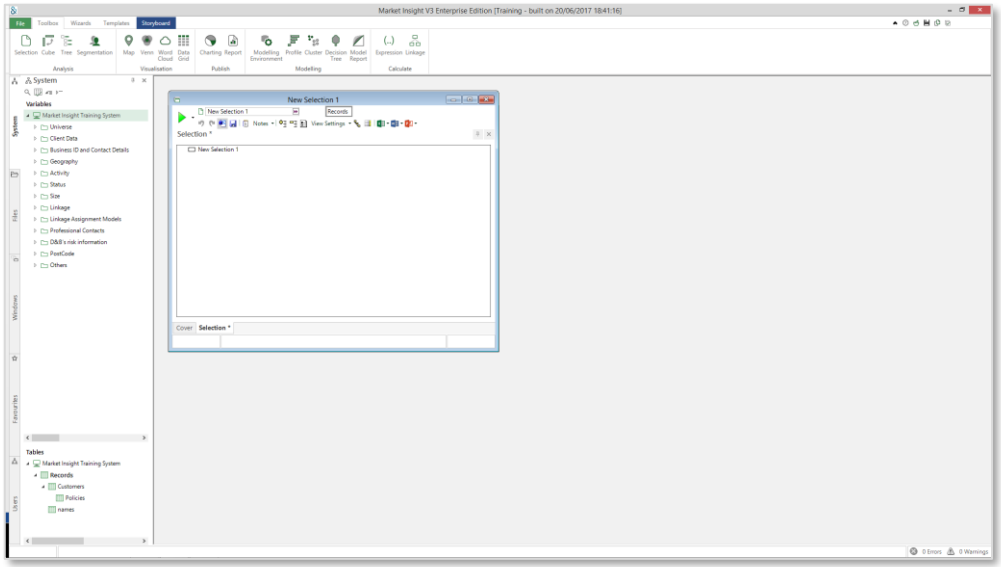


Login Window

Navigating Market Insight

Once you have logged into Market Insight the main screen will load as shown opposite. This can be arranged to your own preferences.

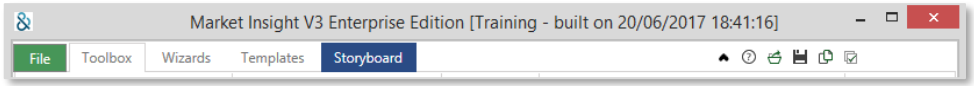
This window consists of a main menu bar and a workspace that contains a number of other adjustable windows including a blank Selection window/page.



Market Insight Main Screen

Main Menu Bar

A number of functions can be performed from the menus shown here, including creating new selections and reports as well as changing options and accessing the Help system.



Main Screen Menu & Icon Bar

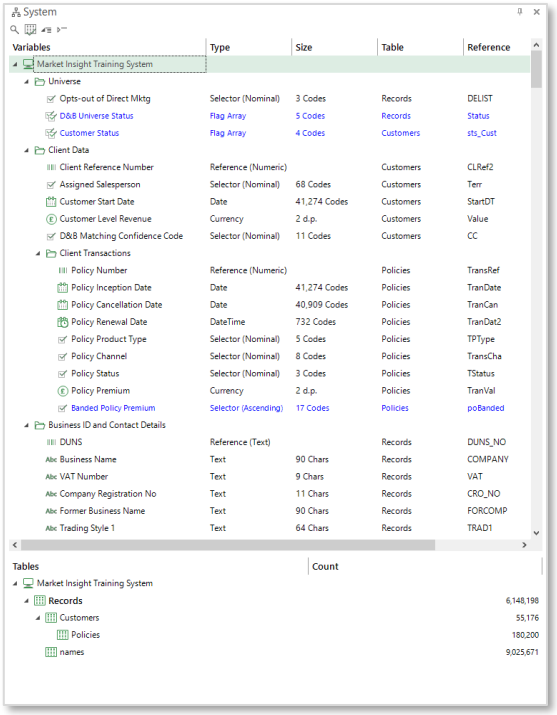
System Window

This is where all the elements of the system are displayed. You can see here the variables that can be used and how they have been grouped into appropriate folders.

The bottom part of the screen displays the tables that are used to hold the different elements of data in the database.

Both the variables and tables can be dragged from here onto other parts of the application to use or apply that setting.

At the bottom of the window are three further tabs that display File Window, Favourites and Current Windows.

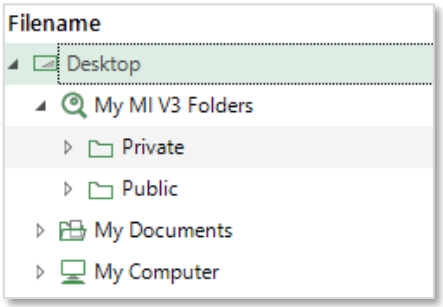


System Window & System Tables Window

File Window

The File Window provides access to private and shared public folders on the server where you may save your work. It also provides access to the local resources on your Windows PC. We will return to this area later in the course.

The File Window can be searched. To use this function ensure you have the folder you wish to search highlighted and then click on the binocular icon.



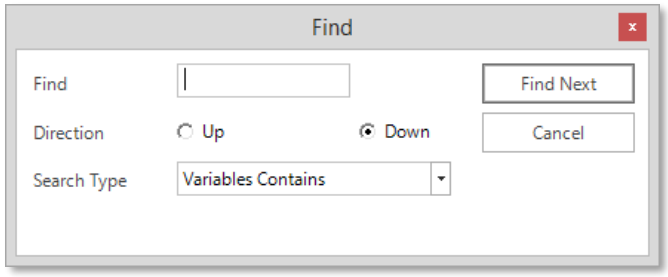
File Window

Favourites Window

This is the area where you can store any frequently used items.

Current Windows

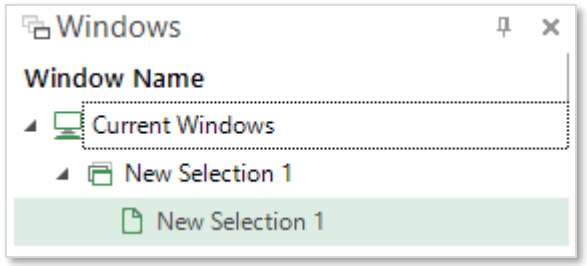
The Current Windows panel gives you an easy way of seeing which windows are open and what they contain without needing to “unlayer” them on the workspace. Double clicking on the relevant icon in this window will bring it to the front of the workspace. You can also drag from this area as an equivalent of dragging from the relevant window.



File Window Search

Templates

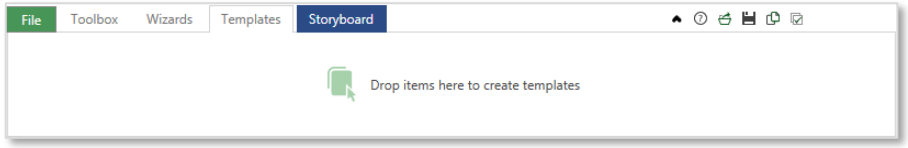
This ribbon bar makes an area available for you to drag items from your Toolbox (see below) so that templates of the settings made can be saved.



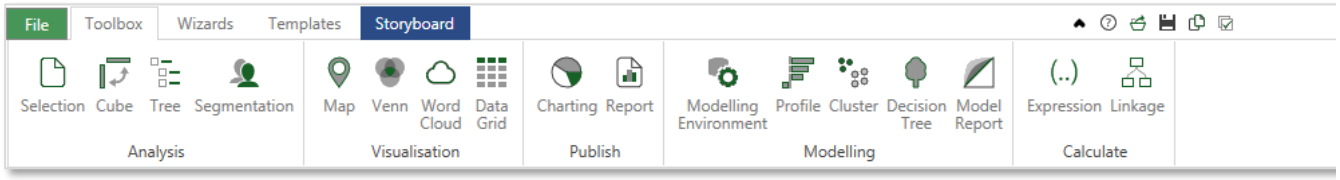
Current Windows

Toolbox

The Toolbox is where the prime functions of Market Insight are made available. Templates of tools with specific settings applied can be created in the lower area of the toolbox. The precise set of tools available depends on the configuration of the Market Insight User. A number of these areas will be covered in more detail later in the course.



Template Ribbon Bar



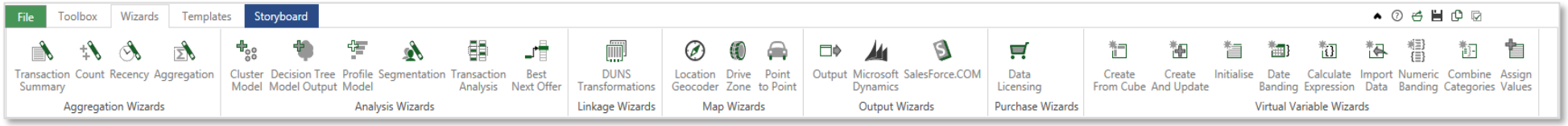
Toolbox Ribbon Bar

Wizards

The Wizards provide easy to use and powerful multi-step processes to create analysis results or further variables based upon existing or manipulated data.

The precise set of Wizards available depends on your Market Insight User configuration.

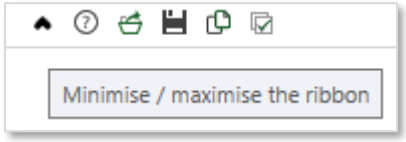
This area is covered in more detail in the Market Insight Base Advanced manual.



Wizards Ribbon Bar

Ribbon Bar Display

By clicking on the small black arrow next to the icon bar, you can either minimize or maximize the ribbon bars.



Ribbon Display & Icon Bar

Restoring the Default Display

If you have closed or moved some of the above windows you can restore them to their original position by going to the main menu and:

- Click on **File → View → Reset windows positions**

Selection

Selection is at the core of all the work within Market Insight, enabling you to identify, count and later analyse a segment of your data.

The window/page opposite will appear in the centre of your screen when you first open your system. As this has been closed you can access a New Selection page by:

- Clicking on the **Toolbox** and then the **Selection** button

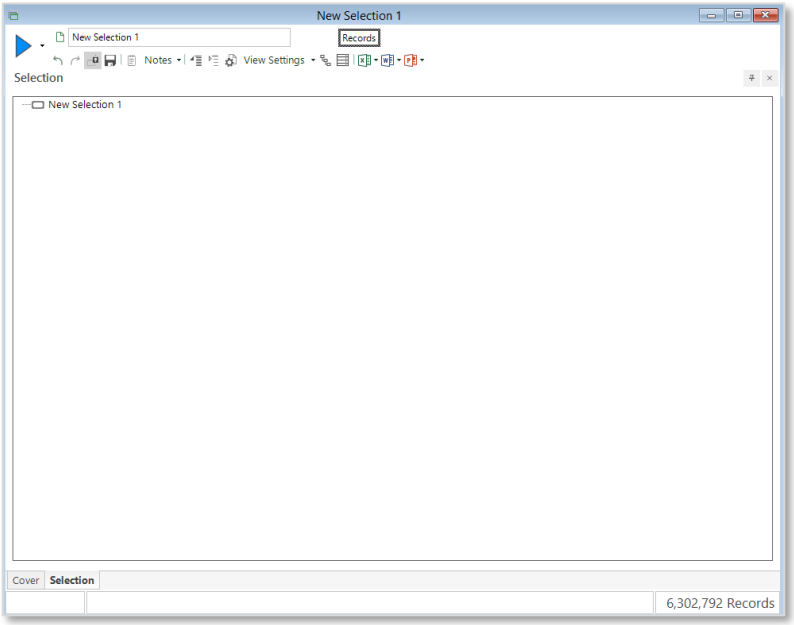
There are other ways of opening a selection window and you will come across these as you work through this manual.

You will notice this window has a default name of "New Selection *N*" (the number "N" is dependent upon how many windows you have previously opened) and is set to resolve on the Records table in the Market Insight data structure. This means if we count this empty selection Market Insight will return all the Records at this table level.

- Click the **Build** button (Build Changed Pages) to count the number of records

If you look at the bottom right hand corner of the window you will see the result in terms of Records.

N.B. All Market Insight systems will have a default table level. The Training database is set to the Records table level. However this can be changed by right clicking on the desired table in the System Tables panel and selecting Set as Default Table.



Selection Window

Variable Types

As you have already seen, the System Explorer holds the various variables that are available for your use. The table below describes the variable type denoted by the coloured icon at their side.

Reference 	This is the unique row identifier for a table. A table may only have one ID variable.	**Text** 	This option allows you to search by text and wildcard criteria.
Selector 	This is displayed as a pick list for all coded or categorical data.	**Multi Response** 	This option will display as the Selector but allows for a multi-response on/off indicator.
Numeric 	This option allows you to search by numeric threshold and range criteria.	**Currency** 	This option operates in the same manner as a Numeric variable but can have the number of decimal places predefined.
Date 	This option allows you to select dates by days or months and years and optionally by a date rule.	**Date/Time** 	This option operates in a similar manner as a Date variable but also allows for a time frame to be included. The Date selection and the Time selection are Anded together to obtain the final result.

Using a Selector Variable

To specify a selection you need to define criteria you wish to search on using the variables within the System Explorer window.

- Navigate **Size** → **Employees** → **Actual (Employees)**. Drag and drop the **Banded Nr of Employees (Site)** variable onto your open selection window

You can now select which Ranges you want to include in your count.

- Click on the **1 - 5** band and drag down to select all the bands up to and including **11 - 20**

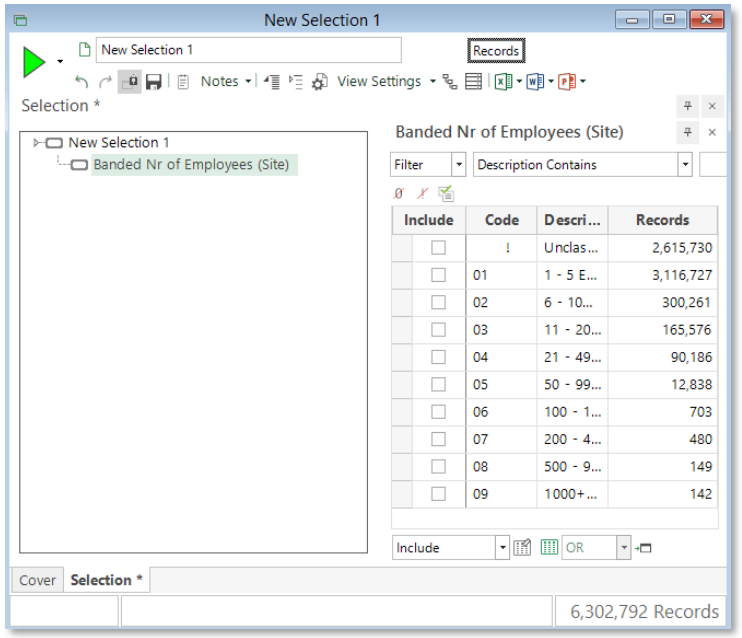
- Click anywhere within the **Include** column of the selected bands to mark the ranges as selected

N.B. It is the presence of the check mark, not the highlight colour that determines a value is selected.

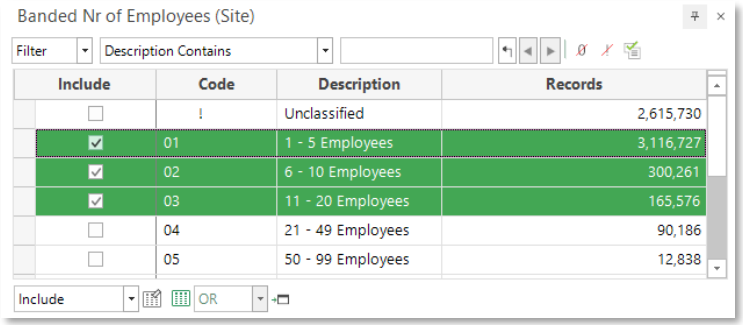
- Click the **Build** button to count the number of **Records**

A progress bar moves across the bottom of the window and the result is displayed in the bottom right hand corner. Use the Reset button at the bottom of the screen and spend a few moments experimenting with selecting and counting various selections on the Banded Nr of Employees (Site) variable. Return to the selection shown in the screen shot opposite.

N.B. You may have noticed that the Build button will change from blue to green when a change has been made to the selection. Also the result display will be greyed slightly to indicate the figure there does not necessarily correspond to the selection now showing.



Selection Window with a Selector Variable



Selected Categories

Adding more Variables from the same Table

By adding further variables you can narrow the selection. In this example you will add the UK 2003 SIC 4 Digit variable.

- Navigate to **Activity** and click on the plus sign next to **UK 2003 SIC 5 Digit**. Drag and drop the **UK 2003 SIC 4 Digit** variable underneath the **Banded Nr of Employees (Site)** variable in the selection window

To display only the SIC codes that refer to Retail we can use the Filter facility in the middle of the window.

- Type **Retail** in the box adjacent to the **Filter:** box

- Use the **Select All** button to select all the categories that have been returned

You will have noticed that as the variable was added to the selection the default logic operator AND was used to join them together.

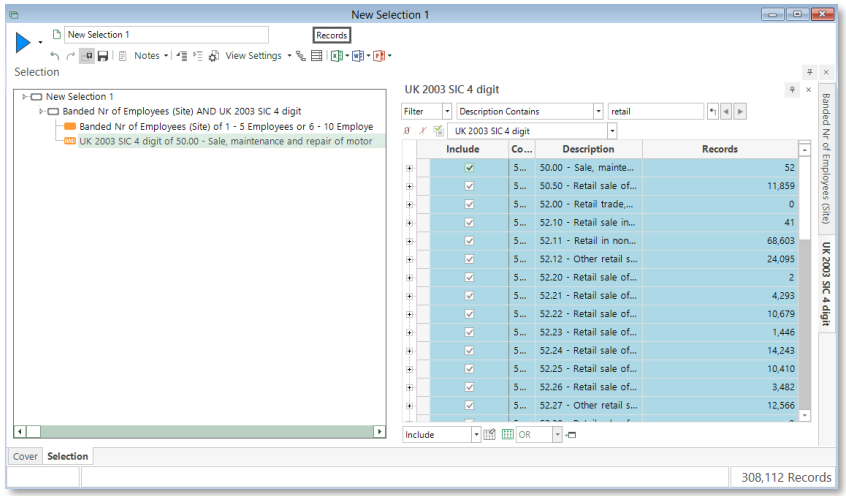
- Click on the **Build** button to count the number of Records

To widen the search you could specify that records are returned for Sites where either of the specified criteria is met. This can be achieved by replacing the AND logic operator with an OR.

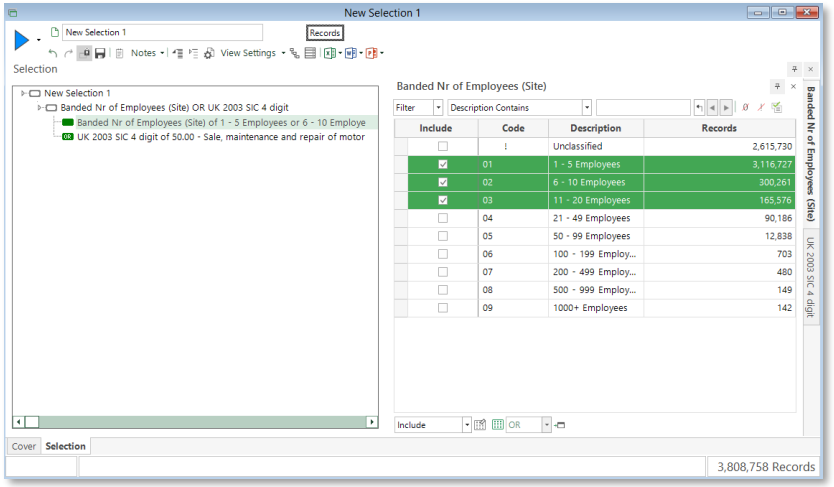
- Right click on the **AND** node and select the option **Change Logic to OR**

- Click on the **Build** button to count the number of Records

N.B. Notice that the result has increased significantly as Records may meet either one of the criteria rather than both.



Variables using AND logic



Variables using OR logic

Using a Multi-Level Variable

We will now use a multi-level geographical variable to narrow down the selection even further. First reset the logic between the existing variables to an AND:

- Right click on the **OR** node and select **Change Logic to AND**
- Navigate to **Geography** → **PostCode** → **UK Postcode Area** (option at bottom of tree) and drag the variable into the existing selection window. Select **B** for Birmingham
- Click on the **Build** button to count the number of Records

To narrow the selection further to specific districts we can zoom in on the category of Birmingham.

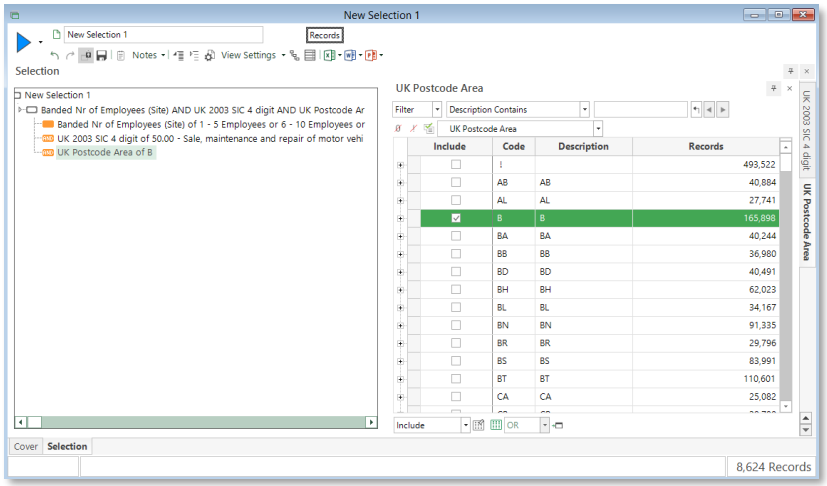
- Expand the display by clicking on the + to the left of the row for **B**

This feature allows you to zoom down to the Districts within Birmingham. These Districts are currently all selected as they are part of the Area we selected.

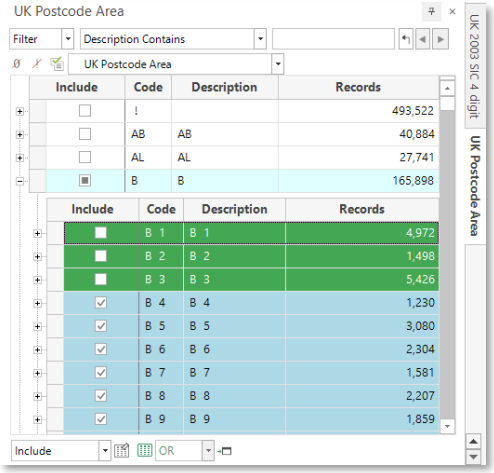
- Deselect **B1**, **B2** and **B3**
- Click on the **Build** button to count the number of Records

N.B. You can change which of these associated variables are displayed by selecting from the Filter box.

N.B. Remember the counts and figures shown here may differ to those when you use this system, as the data changes over time.



UK Postcode Area Variable



Deselected District Categories

Saving & Reopening your Selection

Before saving your selection for re-use at a later date, it makes sense to give it a logical name.

- Highlight **New Selection 1** in the top left hand corner of the window and type – **Low Employee Retail Birmingham** – and then click away

You can now save your newly named selection in two ways:

- Click on the **Save** icon and navigate to the **Private** folder
- Click the **Save** button once you have chosen the Type of file to save

From the **Type** drop down you can choose:

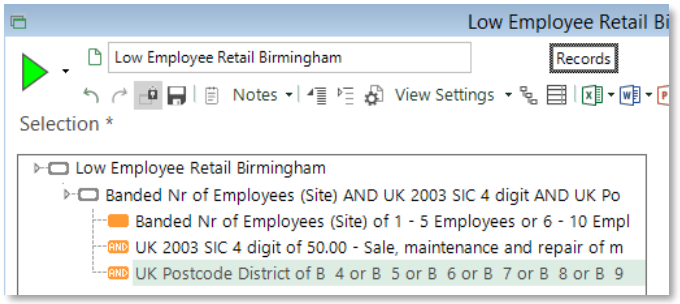
Save Selection Settings – This will remember the variables and settings made on the Selection and will be run and give results based upon whatever is in the current database.

Export To Reference File – This will remember the URN's of the records found when the Selection was first run. This will always return the same records unless deleted from the database.

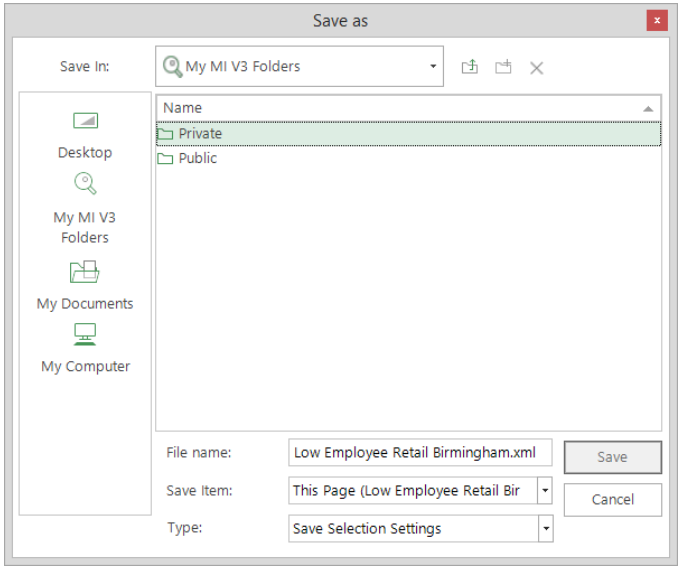
or

- Clicking on the icon next to the selection name and drag and drop onto the **Private** folder in the **File Explorer** window

This will save as Save Selection Settings whereas a right click drag and drop will give you the option of also saving as Export to Reference File.



Renaming a Selection Window



Save Window

- Close the currently open **Low Employee Retail Birmingham** selection window and drag and drop the saved selection back onto the workspace

You will note that the display defaults to a Selection book cover. This is a summary of the work undertaken and would list all the pages within the book which would be the Selection page and any other Tools that may have been used.

- To view the details of the selection criteria, click on the **Selection** tab and then on the relevant line in the logic tree

Saving a Book of Work

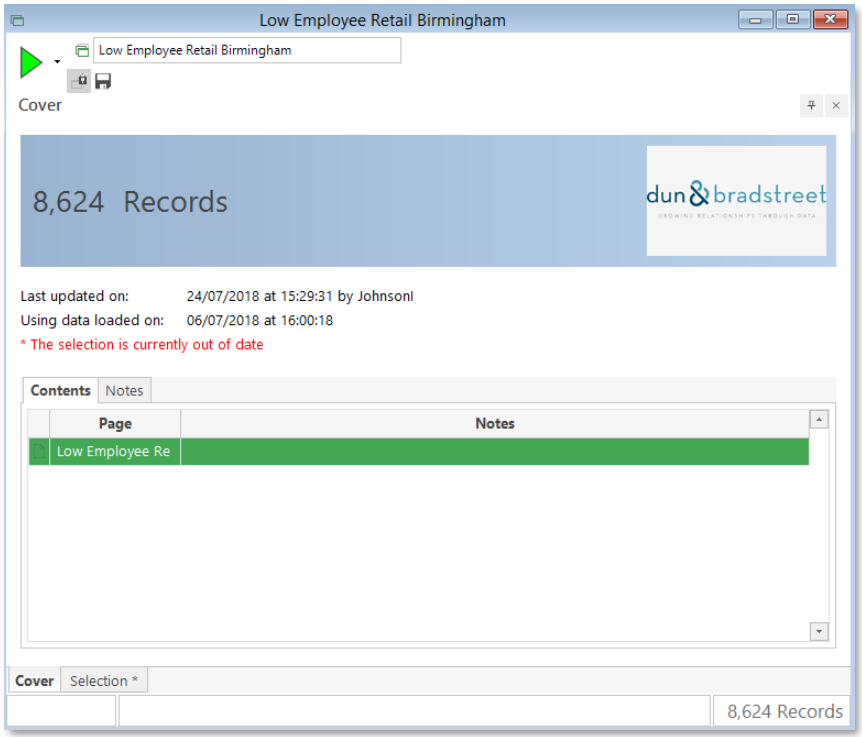
The previous example explained how to save a Selection page and retrieve it. When you use the tools (explained further in this manual) to analyse or visualize your work you may wish to save all the pages as a work book.

You can do this by:

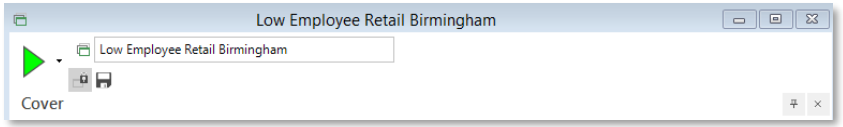
- Select **Whole Book** from the **Save Item** section of the **Save as** window

or

- Drag the icon on the **Selection Book** cover (see opposite) onto the appropriate folder of the **File Explorer** to save all the work pages



Cover Page of a Selection Window/Book



The Selection Book Icon

Using Numeric Variables

Although many numeric variables are pre-banded for ease of use in Market Insight, it is also easy to analyse and select directly on numeric variables. For example, if your business uses different categorizations for size of business, you can specify these directly on numeric variables.

- Navigate **Size** → **Actual (Employees)**. Double click on the **Nr of Employees (Company)** variable. This will create a new selection based on the **Nr of Employees (Company)** variable

There are two methods to enter and review numeric selections. The default is **FreeForm** shown by the button. Enter the ranges shown opposite

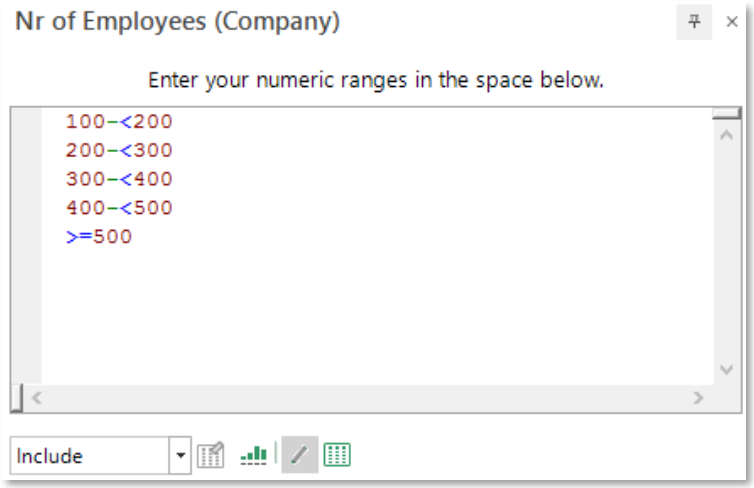
Review the same criteria in **Grid** mode by pressing the button. Extend the criteria by using the popup menus in the bottom row.

N.B. The different threshold options, including "**><**" which selects records with missing values (i.e. no number specified) in the **Nr of Employees (Company)**

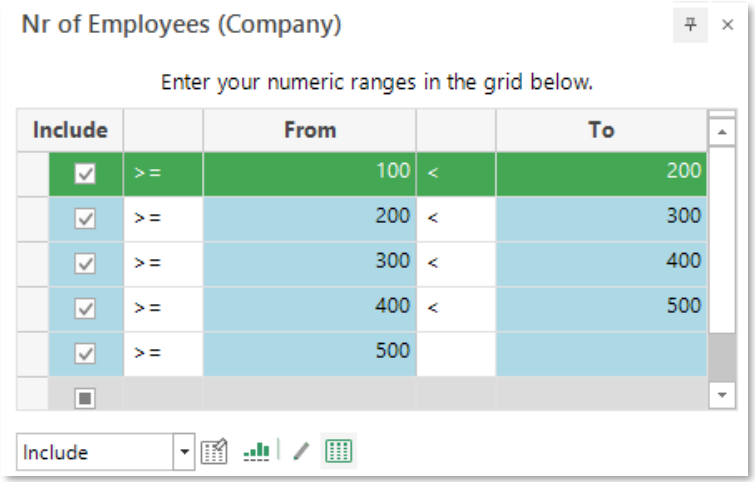
- Click the **Build** button

This count returns the number of Records where the Nr of Employees (Company) values fall within one of the ranges.

- Click the **Reset** button. Note that this removes the ticks from the ranges you entered. To remove the ranges from the definition, highlight the rows at the left edge and press the Delete key



Numeric Variable Using a Free Form Display



Numeric Variable Using a Grid Display

Numeric Distribution and Ranges

The numeric selection method provides some understanding of the distribution of values in the numeric variable. However, Market Insight provides a powerful distribution analysis and range generation tool:

- Click the button to launch the **Banding** tool

The system automatically updates the displays of the banding as you work.

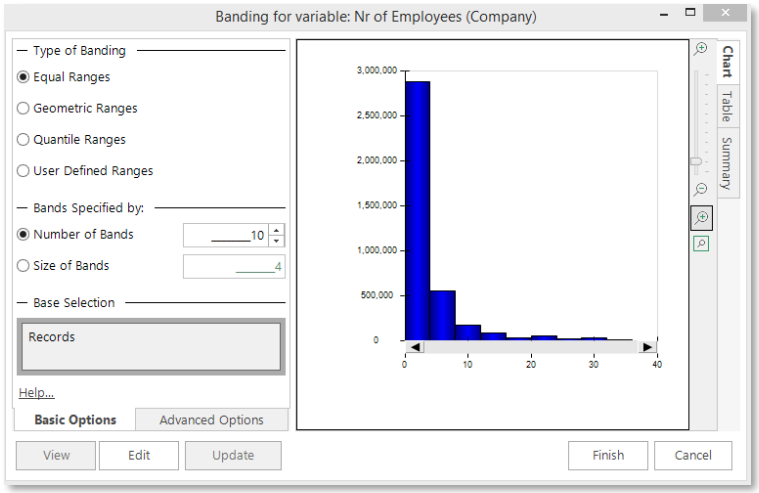
The Type of Banding panel allows you to specify the method used to create the band values:

- **Equal Ranges**
  Divides the range between the lower and upper bounds into an equal number of bands. You can specify either the number or size of bands you require

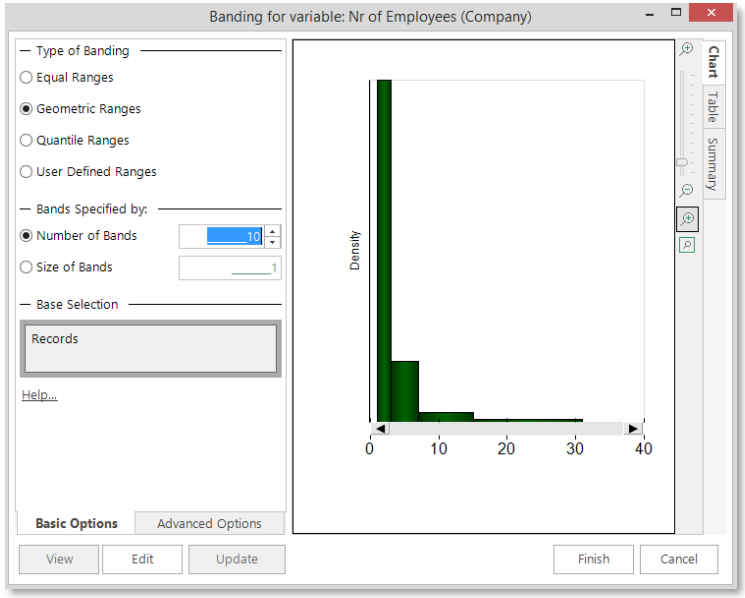
- **Geometric Ranges**
  Divides the range between the lower and upper bounds into a number of bands with increasing size. You can specify the number of bands or the size of the first band

- **Quantile Ranges**
  Divides the range between the lower and upper bounds into a number of variable size bands each with equal population as far as this is possible. For example, selecting 4 intervals will create quartiles, each interval having roughly 25% of the data. You can specify the number of bands (but not the size)

- **User Defined Range**
  Divides any range into any number of bands. The definition of the bands specifies the number and size of bands



Banding Emp Total Variable into Equal Ranges – Chart Display



Banding Emp Total Variable into Geometric Ranges – Chart Display

You may wish to start by looking at a simple frequency distribution for your numeric variable to get an idea of the spread of values.

- Use the default settings of **Equal Ranges** with **10** Bands

This calculates and then displays a chart showing the distribution of values in the variable. You can also view this information in a tabular presentation by clicking on the Table tab.

The Base Selection allows you to apply a selection to determine what subset of rows the distribution analysis will be performed on.

The Summary tab displays statistics about the numeric values (restricted by the Base Selection if applied).

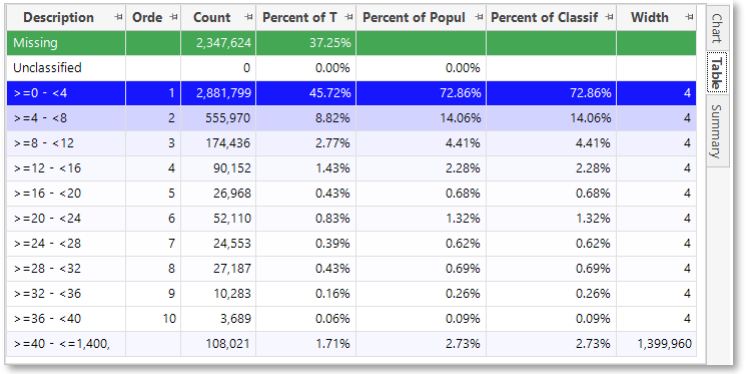
The Advanced Options tab enables you to control:

Range Covered by Bands
Sets the lower and upper bounds respectively to use or ignore the 2.5% extreme values. If no such extreme values exist, the system will use the full data anyway.

Automatic Rounding
Whether the start, end and width of bands is rounded to whole tens, hundreds, thousands etc. to make them easier to read and interpret.

Extreme Values
Whether bands are created to cover the extreme values (outside the number of bands specified for the main data). If no bands are created for extreme values, records with these values will be "unclassified".

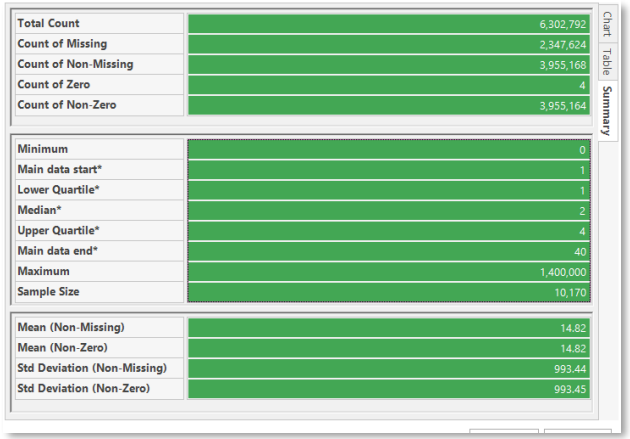
- Click the **Finish** button to set the ranges in your variable



Description	Orde	Count	Percent of T	Percent of Popul	Percent of Classif	Width
Missing		2,347,624	37.25%			
Unclassified		0	0.00%	0.00%		
>=0 - <4	1	2,881,799	45.72%	72.86%	72.86%	4
>=4 - <8	2	555,970	8.82%	14.06%	14.06%	4
>=8 - <12	3	174,436	2.77%	4.41%	4.41%	4
>=12 - <16	4	90,152	1.43%	2.28%	2.28%	4
>=16 - <20	5	26,968	0.43%	0.68%	0.68%	4
>=20 - <24	6	52,110	0.83%	1.32%	1.32%	4
>=24 - <28	7	24,553	0.39%	0.62%	0.62%	4
>=28 - <32	8	27,187	0.43%	0.69%	0.69%	4
>=32 - <36	9	10,283	0.16%	0.26%	0.26%	4
>=36 - <40	10	3,689	0.06%	0.09%	0.09%	4
>=40 - <=1,400,		108,021	1.71%	2.73%	2.73%	1,399,960

Chart Table Summary

Banding Emp Total Variable into Equal Ranges – Table Display



Total Count	6,302,792
Count of Missing	2,347,624
Count of Non-Missing	3,955,168
Count of Zero	4
Count of Non-Zero	3,955,164
Minimum	0
Main data start*	1
Lower Quartile*	1
Median*	2
Upper Quartile*	4
Main data end*	40
Maximum	1,400,000
Sample Size	10,170
Mean (Non-Missing)	14.82
Mean (Non-Zero)	14.82
Std Deviation (Non-Missing)	993.44
Std Deviation (Non-Zero)	993.45

Chart Table Summary

Summary Display

Using Text Variables

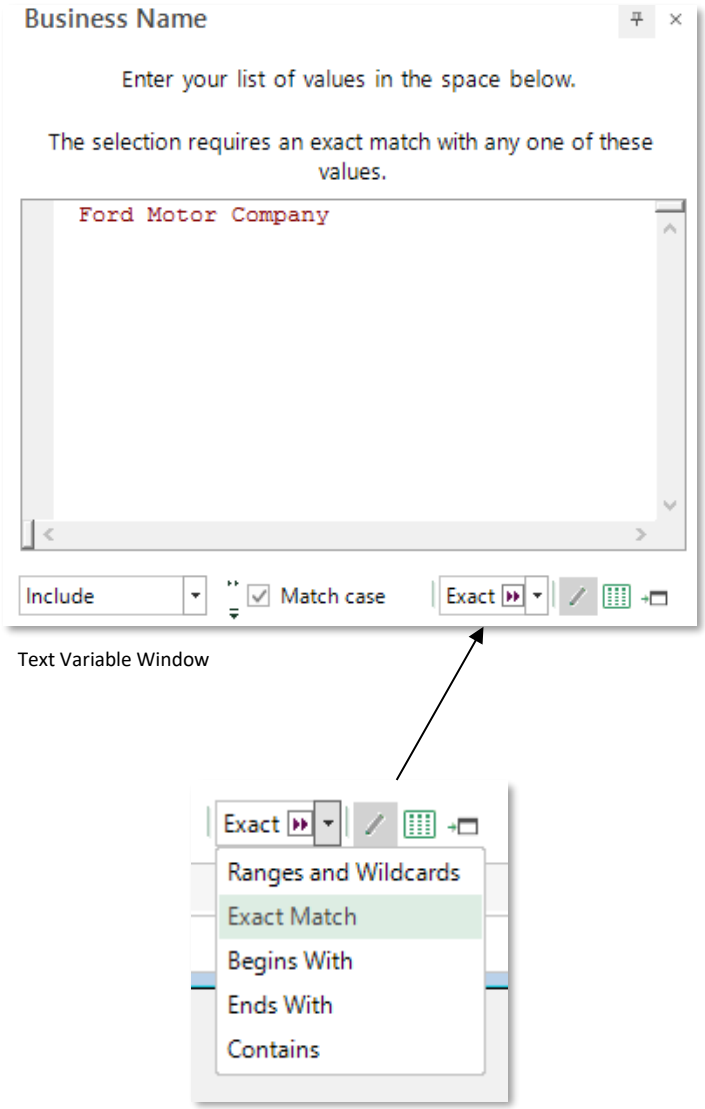
Text variables allow you to search by typing in the value(s) you wish to select with.

- From the **Business ID** folder, display the **Business Name** variable
- Type **Ford Motor Company** as shown in the screen shot opposite

The result of this selection will be to return all Records for the Ford Motor Company.

N.B. The **Match Case** tick box is checked so, in this example only names with a capital on their first letter will be selected. The popup menu allows you to choose between four methods to match the text data:

- **Ranges and Wildcards**
  Allows flexible use of pattern matching and ranges. This is the most flexible but most resource intensive (and hence slowest) matching method
- **Exact Match**
  Allows simple and precise matching of single values
- **Begins With**
  Allows simple matching of the start of the text value
- **Ends With**
  Allows simple matching of the end of the text value
- **Contains**
  Allows simple matching anywhere within the text value



Text Variable Window

Pattern Matching

When using the Ranges and Wildcards setting, three characters have a special meaning:

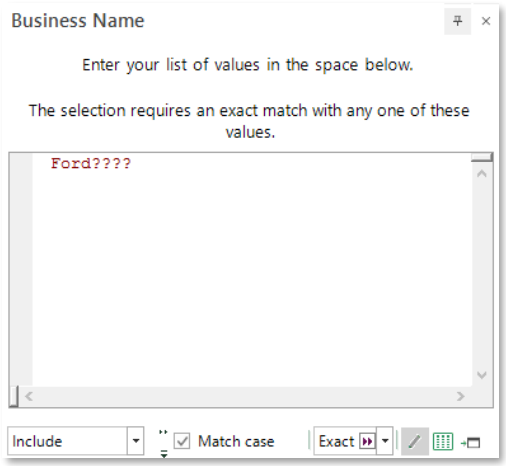
- The "*****" asterisk (or star) character is a wildcard that matches zero one or more characters of any type. "Ford*" will therefore select any business name that begins with "Ford"

- The "**?**" question mark character is a wildcard that matches any single character (letters, numbers, punctuation). Use of several "?" allows you to specify the number of characters to match. The "?" will match a space character within a text value but does not match any spaces (notionally or actually) at the end of the text value. "Ford????" will select all Business Names that start Ford with a total of 8 characters

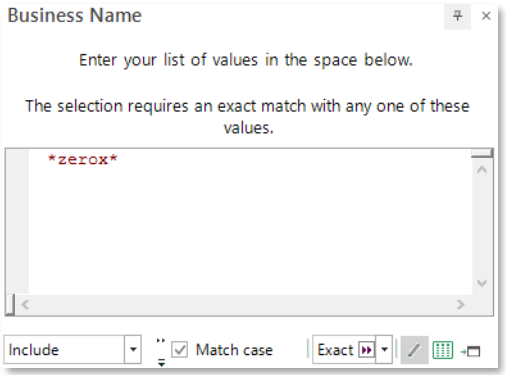
- The "**-**" hyphen character is used to separate the lower and upper bounds of a range of text values. For example, "Ford-Kilo" will select any Business Name that starts with any four letters alphabetically between Ford and Kilo. Note that the ends of the ranges do not need to be the same length

- You may use multiple mixed wildcards in a single selection – for example "*Xerox*" selects any company with the word "Xerox" in the business name irrespective of prefixes and suffixes

- You can use "?*" (i.e. any character followed by anything) as an easy method to select populated text fields. This can be extended to check the formatting of specific data – for example, "?*@?*.?*" selects correctly formed email addresses



Text Variable using the ? Wildcard



Text Variable using the * Wildcard

Using Date Variables

Date variables are a special type of Selector variable that Market Insight can manipulate in different ways. Date variables can be accessed through predefined options, manual selection and date rules.

- Navigate **Client Data → Client Transactions**. Double click on the **Policy Inception Date** variable. This will create a new selection based on the **Policy Inception Date** variable

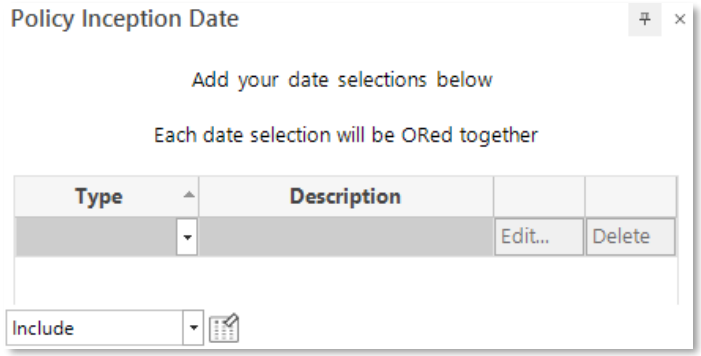
By default the Design process will create a number of predefined options listed under the drop down Type column.

- Click on the drop down arrow under the **Type** column
- Select **Ad-hoc Dates**

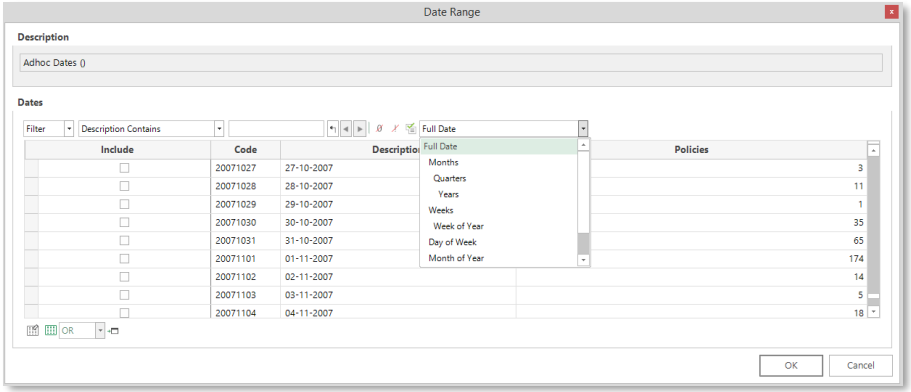
The initial display shows the Full date but this can be changed.

- Click on the drop down arrow next to the box that currently displays **Full Date**
- Click on one of the other options to see the date display change accordingly

Make your selection as you would with any other categorical variable.



Date Variable Window



Adhoc Dates Window

Date Rules

In some circumstances it may be more useful to select a set of dates by defining a rule rather than picking lots of individual days. Whilst rules can be used to select absolute date ranges they can also be used to define more complex ranges and use relative dates too.

- Select **A Date Range** from the drop down menu

The window is divided into three; the From, To and Pattern sections. The From and To sections allow you to define the time period you want to explore and the Pattern options (+currently collapsed) allow you to set the frequency of the information returned.

- Set the date options as **From** 01/01/2016 – **To** 31/12/2016

This will display all the Policies that commenced between these dates. Note the Pattern bar states it is counting Every 1 day, which means every day in the time period is being considered.

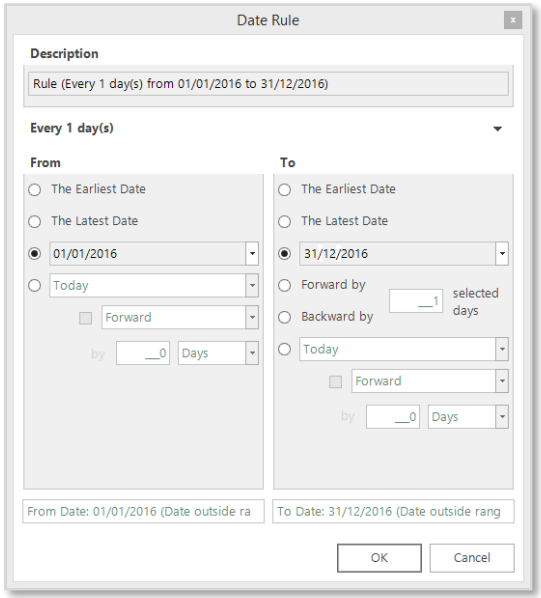
A number of other predefined rules are available for immediate selection without any further input needed.

- Select **This Month** from the drop down menu

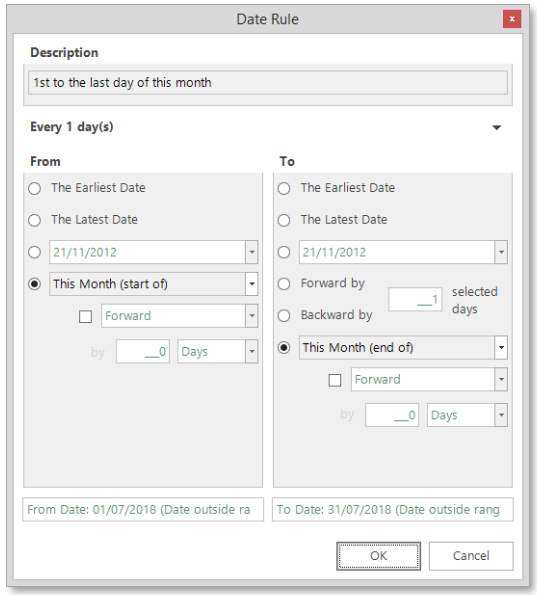
- Click on the **Edit** button at the end of the row that has now been displayed

You can now see the settings that have been used to find all the records in the current month.

N.B. Whichever options you choose, the dates displayed at the bottom of the window will make it clear what date range has been selected.



Defining a Date Range for a Year



Defining a Date Range for the Month

However, you may wish to create your own Date Rule:

- Select **Custom Rule** from the drop down menu

Setting the Time Period

The Earliest and Latest radio buttons allow you to set the search based upon the First and Last date within the data.

The date calendars allow you to specify actual date parameters for your search.

The remaining options allow you to set a wider rule which is best explained with some examples:

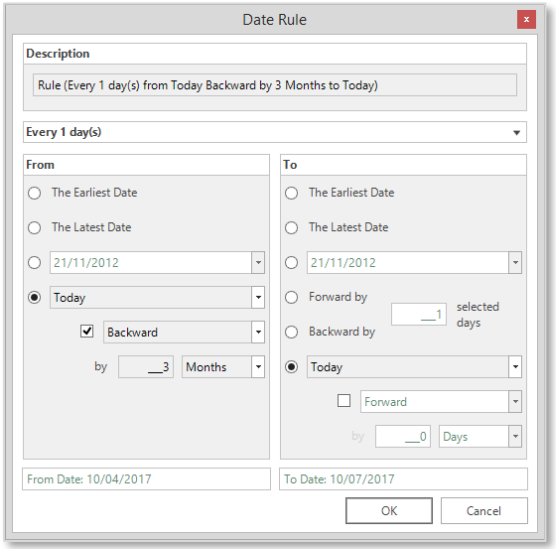
e.g. you want to find all records with a Base Date in the last 3 months as of today. (As shown opposite)

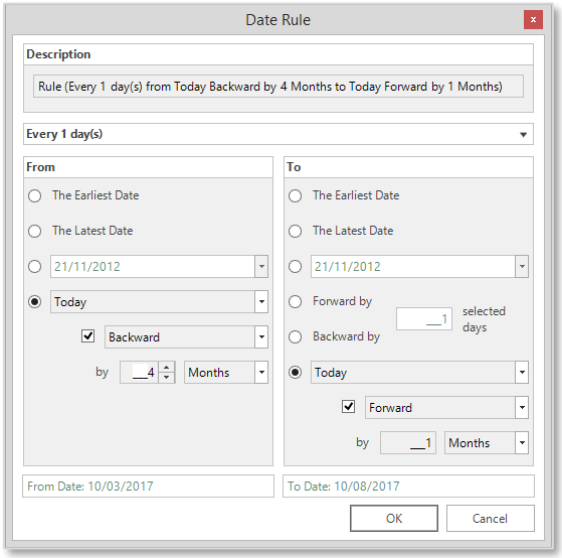
e.g. you want to find all records with a Base Date in the 3 month period ending a month ago (Today is 30th October so time frame will be 30th June to 30th September) (As shown opposite)

Pattern Section

- Click on the drop down arrow on the row entitled **Every 1 day(s)**

The options here allow you to determine which days in the time period you have set in the Date Rule, will be used to return results on. The default option is to return results for every day within the time period set.





Examples of Custom Rules

Date/Time Variables

Some Date variables give you the opportunity to apply an additional time constraint. It may be you want to identify transactions that took place on certain dates but only during certain hours of the day.

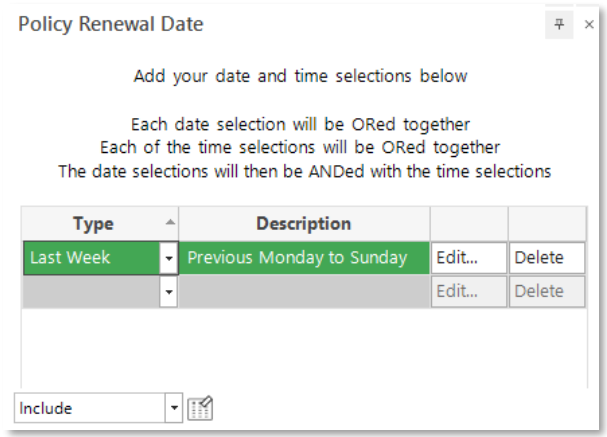
- Display a **Date/Time** variable if one is available
- Click on the drop down arrow under the **Type** column
- Select **Last Week**

You could select other date periods at this stage and each date period will be ORed together.

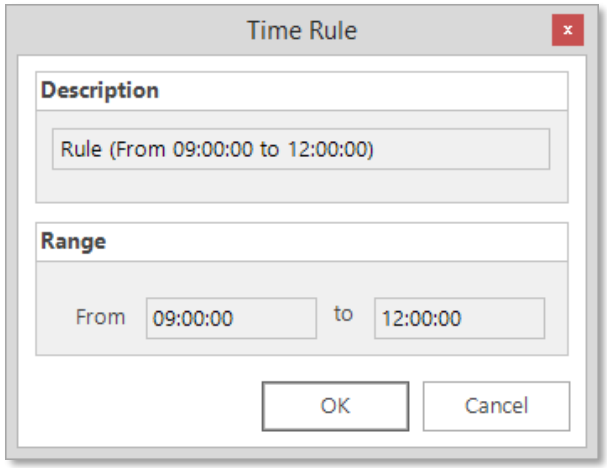
You may now want to restrict the time these communications were made to those that just took place in the morning. If more than one time period is required each one will be ORed together.

- Click on the drop down arrow under the **Type** column
- Select **Custom Time Rule**
- Set the **Range From 09:00:00 to 12:00:00** and click **OK**

The Date periods and the Time periods will now be ANDed together to obtain the result. In this fictitious example, we would get a count of policy renewals made last week in the morning between the hours of 9am to midday.



Date/Time Variable Window



Custom Time Rule Window

Using Multi-Response Variables

A multi-response variable (bold) allows a certain number of codes to be held on that record e.g. 2 Dig SIC Codes – each SIC code has a 2 character code and the variable holds 12 characters, therefore each site can hold up to 6 sic codes against their entry.

Alternatively, a multi-response variable (light) holds information as a series of Yes/No responses where an individual may need to be recorded in more than one category e.g. A variable that recorded the **Functions** of contacts – a Name may have no function, 1,2,3 functions.... or be a member of all available functions.

By default the internal logic used in variables with a pick list is to use an OR logic operator.

e.g. **Functions** of Marketing **OR** Sales **OR** Administration.

Since it is possible that a site may have more than one SIC Codes and because of the way in which the data is held, you may want to find those sites that have a combination of SIC Codes.

e.g. **Functions** of Marketing **AND** Sales **AND** Administration.

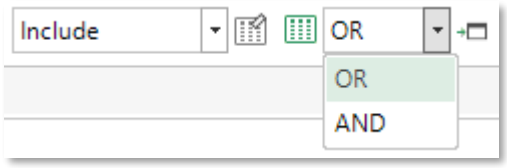
By being more restrictive with the selection logic the results tend to reduce.

The internal logic on a multi-response variable can be changed by clicking on the box at the bottom of the window between OR and AND.

The logic on a standard categorical variable is defaulted and restricted to an OR due to records falling into only one category e.g. Banded Nr of Employees (Site).

Include	Code	Description	names
☐	01	Senior Decision Maker	8,655,252
☐	02	Finance	174,333
☑	03	Marketing	86,784
☑	04	Sales	97,583
☑	05	Administrative	41,186
☐	06	IT	69,475
☐	07	Human Resources	68,906
☐	08	Health and Safety	26,022
☐	09	Facilities	58,553
☐	10	Operations	40,327
☐	11	Purchasing	58,222
☐	12	Fleet	34,382
☐	13	Engineering	20,589
☐	14	Other	107,565

Functions Multi-Response Variable



Option to Change the Internal Logic

Selection Logic with AND & OR

Until now, you have primarily used the AND logic to restrict the selection further with each variable. Market Insight allows selections to be widened with the OR clause and excluded with the NOT clause.

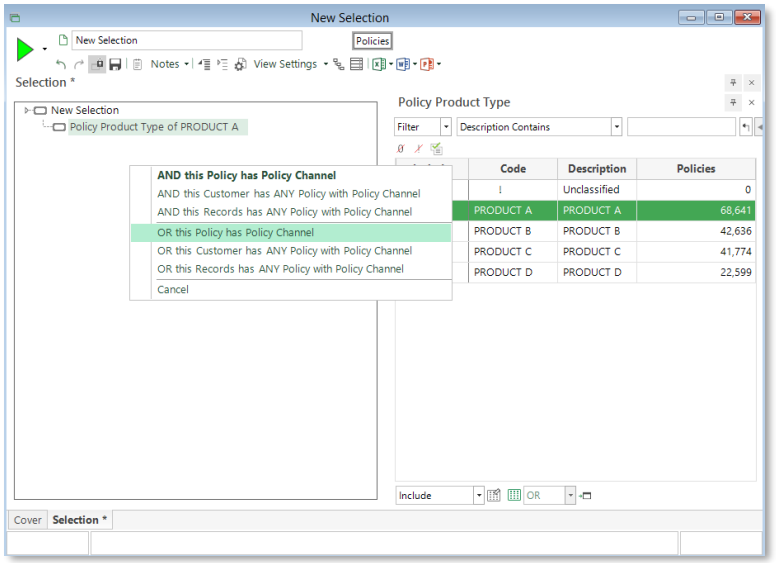
- Drag the **Policy Product Type** variable onto the workspace and select **Product A**
- Right-Click and drag the **Policy Channel** variable onto the selection window

N.B. A popup menu is presented with the options for AND or OR at both the Policies table and the Customers and Records table above it. The default (AND) is shown in bold.

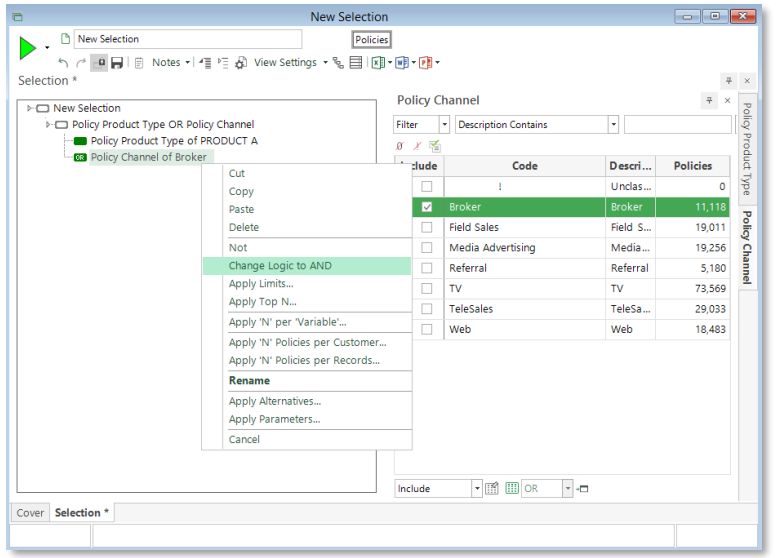
- Choose **OR this Policy has Policy Channel** to see the selection structure with a green icon. Choose **Broker**
- Click the **Build** button

N.B. You can also control the logic used in a selection:

- Right click on an existing selection clause and choose **Change Logic to…**



Selecting Query Logic



Changing Between OR and AND Logic

How Selections Work

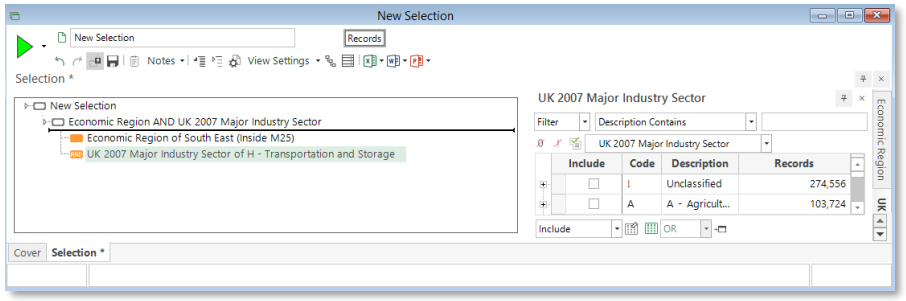
Notice that when you drag a variable over the selection tree you see two indicators:

- a black insert line between existing items
- a blue merge shading on existing items

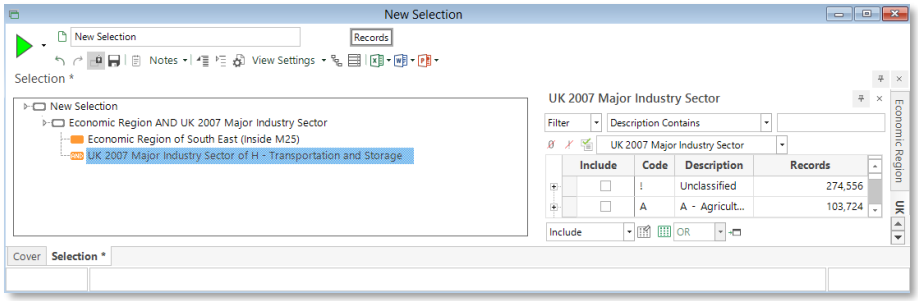
The insert line lets us indicate where to insert a new item. Notice that on nested clauses, the extent of the left edge of the insert bar indicates which clause the insert will be made into.

The merge bar (achieved by dragging a variable on top of another variable) indicates that the dragged item is to be associated with the target item and merged into a new sub logic clause.

A new variable dragged into the default area (below the existing selection criteria) will add to the existing bottom logic clause if the item dragged is on an ancestor or descendant table or create a new clause from the root level if not.



Insert Line Indicating Where A Variable Will Be Placed



Result Of Two Variables Being Merged

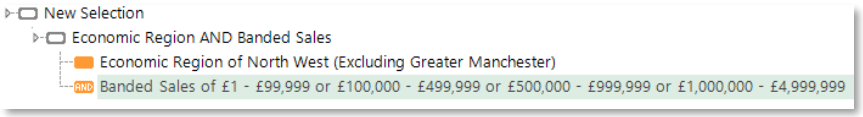
Multiple use of a Variable

Using the same principles you can build up a more complex selection using the same variables more than once. In this example you will find North West Low Sales OR South West High Sales.

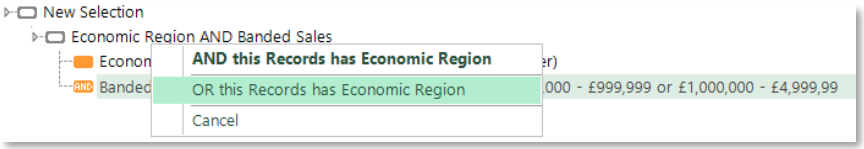
- Double click on **Economic Region** to open a new selection window. Select **North West**
- Directly below the **Economic Region** variable drag and drop the **Banded Sales** variable. Select all bands between £**1** to **£4,999,999**
- Right click and drag a second **Economic Region** variable above the first **Economic Region** until the black line extends out beyond that heading
- From the popup menu select **OR this Records has Economic Region**. Select **South West**
- Drag and drop **Banded Sales** on (merge with) the second **Economic Region** variable. Select **between £5,000,000 & £1,000,000,000+**

By merging two variables you will obtain the opposite logic operator to the original one stated.

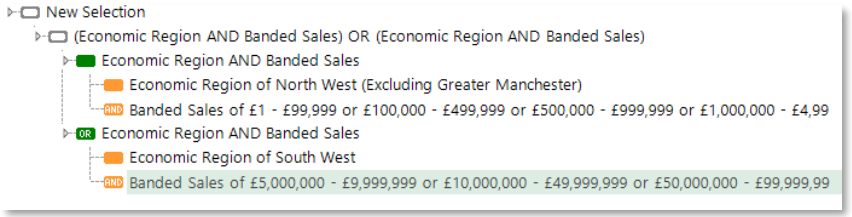
- Collapse the two sub queries to get an overview of the selection so far
- Right click on each sub query row and select **Rename**
- Give each line a more readable name as shown opposite
- Name the selection **North West v South West** and drag it into the **File Explorer** to save



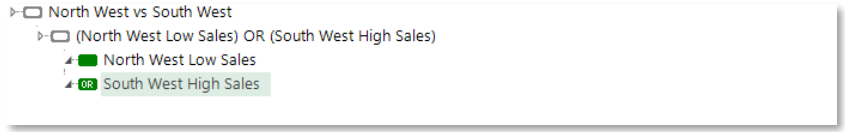
Inserting a New Clause



Selecting Logic from a Right Drag



Mixed Logic in a Selection



Renaming Elements of a Selection

Using the NOT function

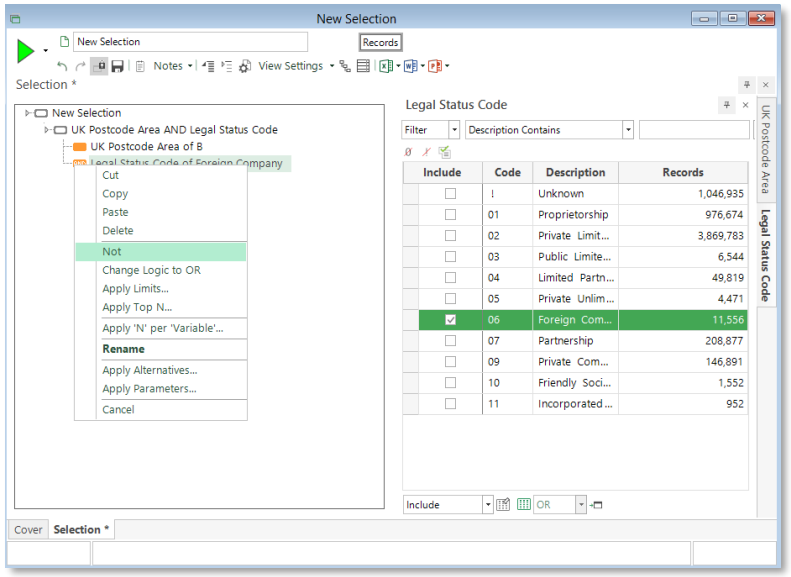
In some circumstances you may want to exclude certain records from your selection results.

You may be interested in Birmingham Records that do not include any foreign companies.

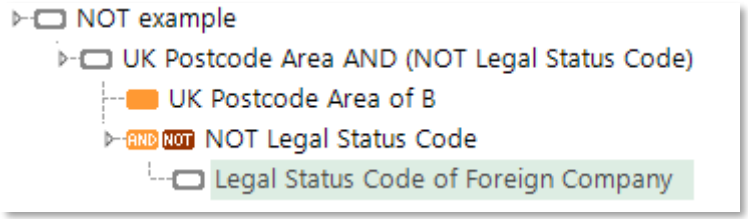
- Open a new selection with the **UK Postcode Area** variable and select **B**
- Drag in another variable, **Legal Status Code** and select **Foreign Company**
- Right click on the second row of the **AND** clause and choose **NOT**
- Click on the **Build** button

The number of records returned here is made up of all the records in Birmingham, but excludes any of those records which have a legal status of a foreign company.

Wherever you use a variable you could also use a saved selection, so it is easy to select one criterion and exclude a previously saved criterion.



NOT Logic Shown on a Right Click Menu



Selection with AND & NOT Logic

Waterfall Counts

Waterfall counts give you the opportunity to see how each element of your selection is contributing to the final count so that you can make informed decisions about which elements to include.

Your system can be set to show Discrete (Individual) or Compound (Cumulative) figures. (Change between the options by clicking on the View Settings icon View Settings)

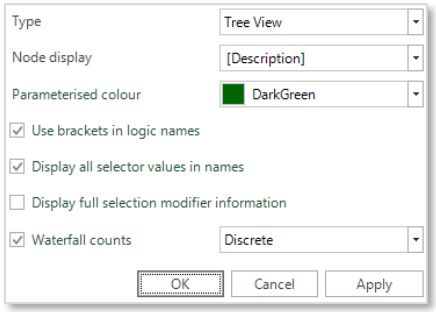
- On the **North West v South West** selection window click on the **Waterfall Counts** button and click the **Build** button

Discrete - Each line shows the total number of records available on the database for that particular part of the selection. The top figure is the net figure once all of the selection elements have been put together and deduplicated. NB: this will always match the final count in the bottom right hand corner. Each selection variable or sub clause will show the amount for that line.

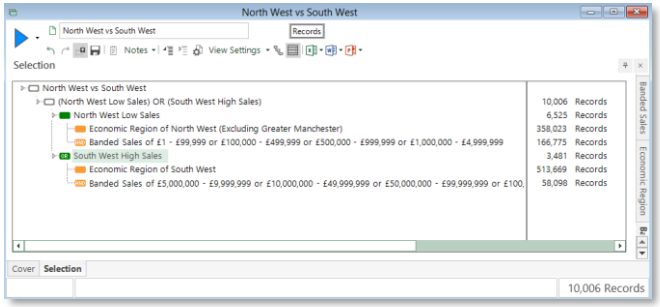
The individual waterfall counts feature is useful if you want to see how many potential records are available on your database without any other selections applied. If your final count is too low or too high then you can see which elements of the database might have influenced the result.

Compound – Each line will show how many records are remaining as each element of the count is applied. Depending upon the logic used, the next figure will get smaller or larger e.g. AND tends to decrease, OR tends to increase the count.

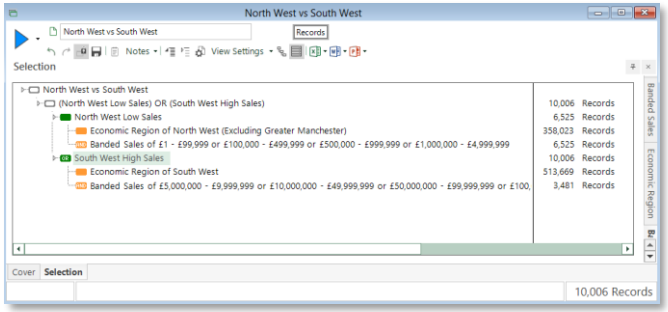
The compound waterfall counts feature is particularly useful if your final count is too low and you want to see if one particular element has caused the count to suddenly drop.



View Settings Window



Waterfall Counts with Discrete figures



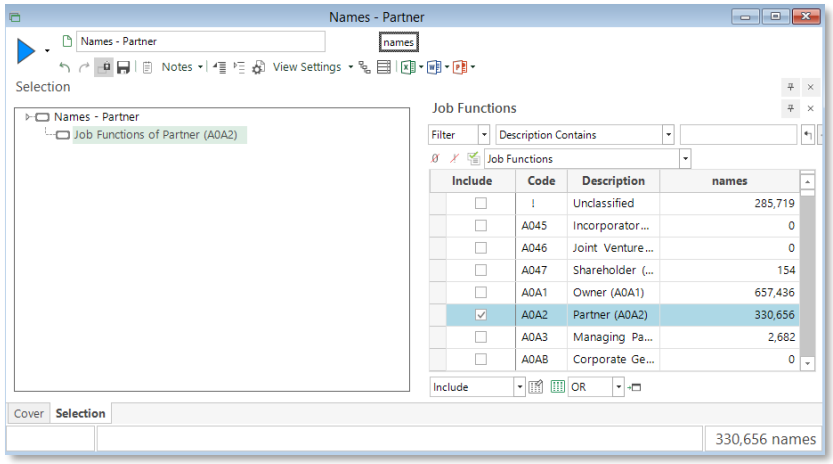
Waterfall Counts with Compound figures

Selections across Tables

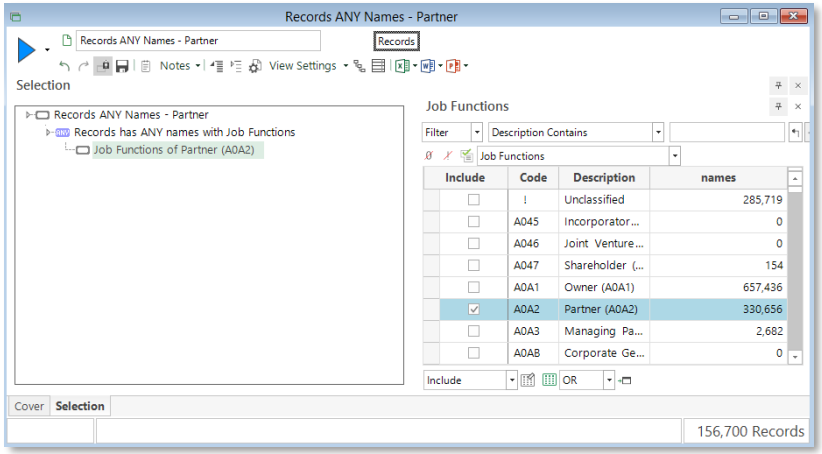
So far you have made some simple selections where the variables have been ANDed or ORed together and the results have been displayed in terms of numbers of Records. You can also make selections that display in terms of numbers of Names (or any other table in your Market Insight system).

So far you have used variables to open new selection windows. There are many ways to create a new selection window. Which method you use will determine the resolve table used by default in that window.

- Double click the **Names** table from the **System Tables** window. Note the resolve table shows **Names**
- Drag onto the selection window the **Job Functions** variable from the **Professional Contacts** folder. Select **Partner**
- Click on the **Build** button and note the result is expressed in **Names**
- Change the resolve table to **Records** by either right clicking on the area at the top of the window that says **Names**, or click and drag **Records** from the **System Tables** panel and drop it on the same area. Note the change in the query to identify that the selection is for any **Records** that have **ANY Names** who have a Marketing Function
- Click on the **Build** button and note the result is expressed in **Records** and consequently is lower
- Change the selection back to resolve on **Names**. Note the **ANY** clause is removed automatically

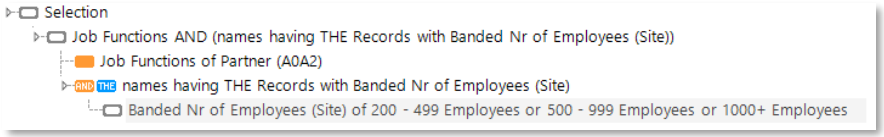


Names with a Marketing Function



Records that have a Name with a Marketing Function

- Drag onto the selection window the **Banded Nr of Employees (Site)**. Select **200 – 249 to 1000+**. Note the selection is now for Names with a Partner Job Function where THE Record they work at has over 200 employees



Number of Names with Marketing Functions at Records with over 200 employees

- Drop **UK Postcode Area** under **Banded Nr of Employees (Site)** and select **B**. Note that the second Record criteria is added within the THE clause and forms a new AND clause

Number of Names with Marketing Functions at Records with over 200 employees in Birmingham

Market Insight supports powerful selections across tables using the THE and ANY clauses.

- THE is used when joining from many records to THE one they relate to
- ANY is used when joining from one record to ANY of the many it relates to

Logic and the Table Structure

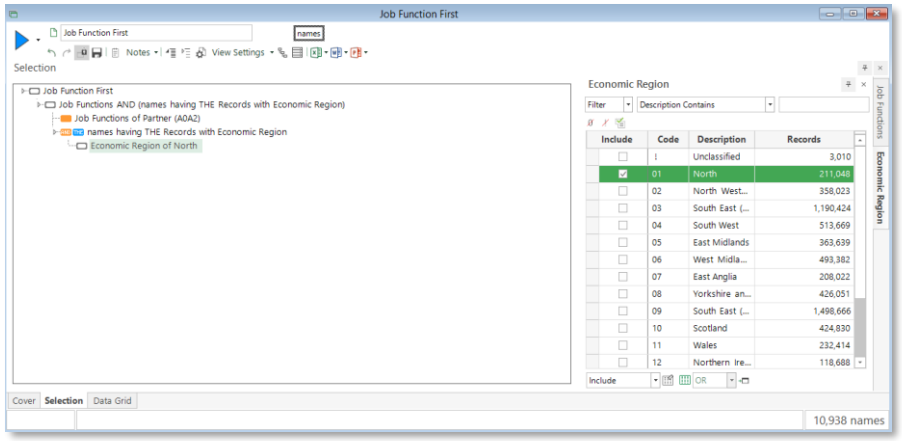
As we have seen table relationships have a one to many structure e.g. one Record can have many Names. The selection window also uses default tables depending on how the window is created. The order in which we apply variables from different tables can therefore have an effect on the result.

For example we decide we want to find all the Partners Job Function Names at Records within the Economic Region of the North. To do this we would:

- Drag and drop **Job Functions** variable onto the workspace and select **Marketing**
- Now drag and drop **Economic Region** under the **Functions** variable and select **North**
- Press the **Build** button
- Save as **Functions First**

By making our Functions selection first, we open a Names selection window because Job Functions is defined on the Names table. When narrowing the selection with the Record table variable, Economic Region we are asking for all Partners at Records in the North.

What difference could it make if we made our selections the opposite way around?



Selection Opened with a Names Variable

Try the alternate order

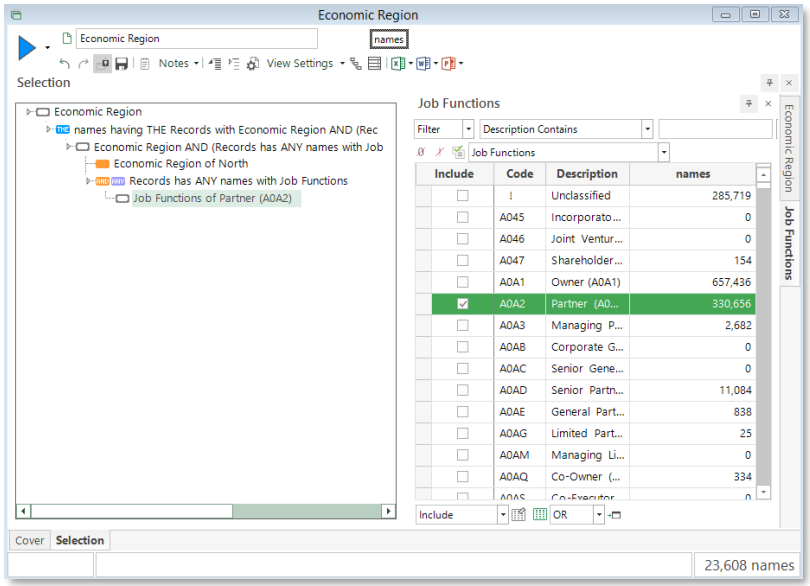
- Drag and drop **Economic Region** onto the workspace and select **North**
- Now drag and drop **Job Functions** under the **Economic Region** variable and select **Partner**
- Change the resolve table to **Names** as we want the result expressed in **Names**
- Click the **Build** button
- Save as **Economic Region First**

Notice that this count has resulted in a higher figure indicating that a different selection has actually taken place.

In this case by selecting Economic Region first we have created a Record selection clause that is then qualified to ensure that ANY of the Names at the Record are a Partner Job Function. When we changed the resolve table to Names, we effectively asked for all the contacts at the selected Records. Hence the higher result.

You can read exactly what the selection requires:

Names where THE record they are associated with is in the North and that record has ANY names with a Partner Job Function. We have asked for (and successfully counted) all the Names at Records in the North that have a Partner Job Function working for them. Market Insight has done exactly what we asked. However, the lesson is to read carefully what we asked the system to do. You can amend the request by simply dragging and dropping the items into the same order as was originally used.



Selection Opened with a Record Variable (changed to Names)

Selection Summary

Variable Selection

You can open a blank selection window into which you can drag the variable you want to use, or double click (or drag) the variable itself onto the workspace where it will open up in its own selection window.

Variable Types

Variables are broadly divided into two types, those that present you with a pick list and those that allow you to specify the criteria on which you want to search.

Logic Functions

The basic functions that are available are AND, OR, NOT. In general by default criteria within a variable use an OR and variables use an AND between themselves.

Location Line

When dragging a variable over the logic box a black line will indicate where it will be placed in the logic sequence. The length of the line will also determine how the variable will interact with the existing query.

Merge Variable

When a variable is dragged over another variable in the logic box it will react in a particular way. The two variables will be associated by the opposite logic currently displayed.

Build

Clicking on this button will resolve your query selection at the Table level you have chosen.

Save Selection

The rules of your selection can be saved by dragging the icon next to the selections name onto the File Explorer or through the Save button.

Data Grids

A Data Grid is a two dimensional view of the results of a selection. Each row in the grid is a record within the selection. Each column displays a field of each record. The column headers show the field names. The cells within the Data Grid are the values for that particular column of a selected record.

You can use a Data Grid to check the data you selected or prepare it for Export. By default a data grid is displayed in Browse mode as indicated by the blue outline to the Browse View button.

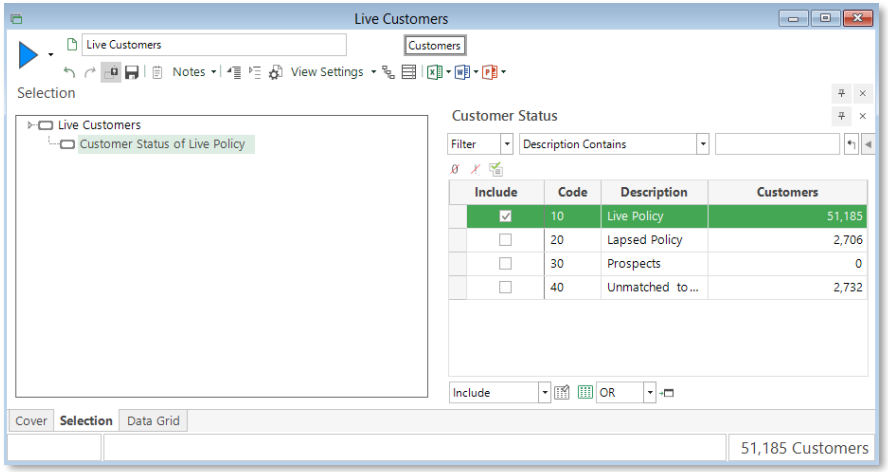
N.B. You may find some columns are blank if the records selected are yet to be Licensed. Also by default only the first 1000 records will be displayed. This can be increased from the Rows to Browse button.

- Drag and drop the **Customer Status** variable onto the workspace and select **Live Policy** (*all of these records have been licensed in the Training system*)
- Drag and drop a **Data Grid** from the **Toolbox** ribbon onto the open selection
- Drag and drop the following variables onto the Data Grid:

  Business Name, Address Line 1, Address Line 2, Town, Postcode

- Click the **Build** button

N.B. To display all the variables used in the underlying selection click on the **Fields From Selection** button.



Selection of Live Customers

Client Reference Number	Business Name	Address Line 1	Address Line 2	Town	Postcode
295621	Tts Equity Ltd	22 Great James Street		London	WC1N 3ES
430984	Spirit Healthcare Ltd	1 Selbury Drive	Oadby	Leicester	LE2 5NG
327168	Gatehouse Bank Plc	Floor 24		London	EC2N 1AR
307768	Saffron Walden Golf Club	Windmill Hill		Saffron Walden	CB10 1BX
283868	Seaton Joinery Ltd	Unit 1 Richard Speirs Road	Kirkton Industrial Estate	Arbroath	DD11 3LT
505210	Criggies Solicitors Ltd	30 Broomgate		Lanark	ML11 9EE
506319	Abu Dhabi Petroleum Co Ltd			London	WC2E 7EE
328049	Rta Trading Ltd	Asher House	Blackburn Road	London	NW6 1AW
405097	Rta Trading Ltd	Asher House	Blackburn Road	London	NW6 1AW
406403	Stockport Grammar School	Buxton Road		Stockport	SK2 7AF
397612	Convergex Ltd	12-18 New Bridge Street		London	

Data Grid Displaying Live Customer Information

There may be some situations where you want to view the records individually.

- Click on the **Browse Page View** button to change the display
- Use the horizontal scroll bar buttons to move through the records
- Click on the **Browse Grid View** button to return to the default display

By right clicking on a variable heading you are presented with a number of useful options:

Change Column To Display Codes – acts as a toggle between codes and descriptions

Change Column To Display Unclassified As Spaces – for use on pick list variables only

Sort Ascending – ABC, 123

Sort Descending – CBA, 321

Remove Sort – Restore to original display

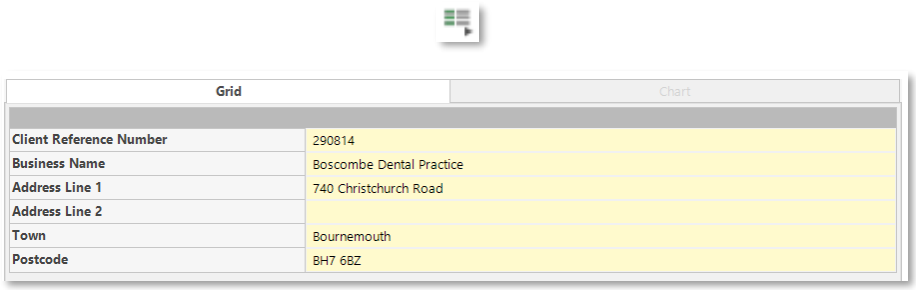
Group by this column – Same as dragging variable onto Group by box

Group by Box – Acts as a toggle switch to display Group by box

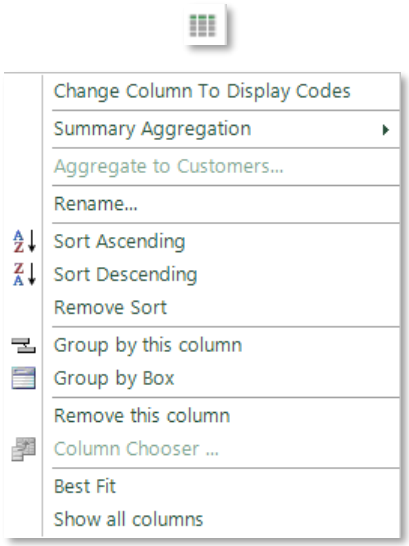
Remove this column – The selected variable is not shown

Column Choose… - Add or subtract standard columns to your display

Best Fit – Resizes the column to its longest value



Data Grid – Browse Page View



Data Grid – Browse Grid View (Right Click Options)

When 2 or more numeric/currency variables are displayed on a Data Grid an option appears to allow you to visualise the values on a scatter plot chart.

- Drag and drop the variables **Customer Level Revenue** and **Policy Premium** on to the Data Grid
- Click on the **Build** button

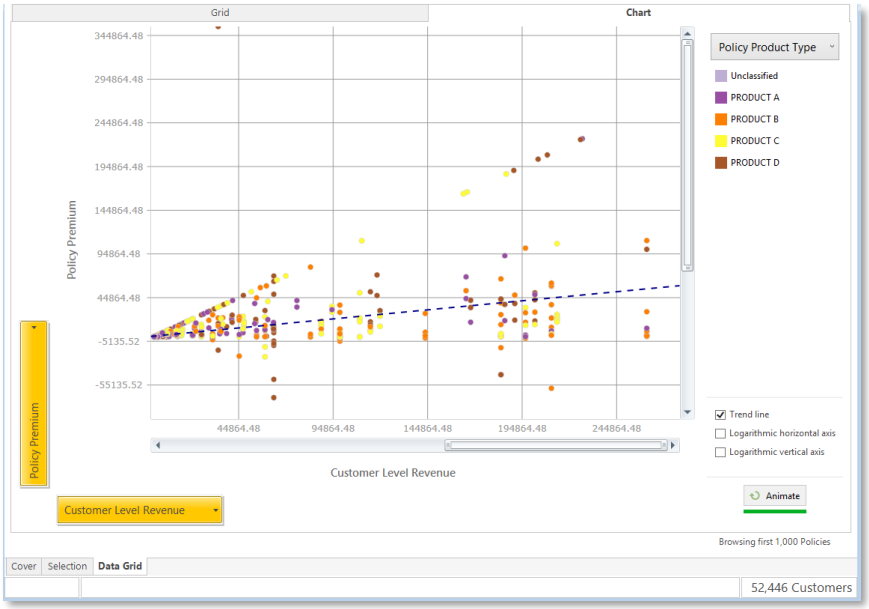
On the right hand side of the Data Grid a Chart tab has appeared.

- Click on the **Chart** tab
- Click on the dimension boxes to select which variable to show on which axis
- Switch back to the Grid view and drag the **Policy Product Type** variable on to the data grid.
- Click on the **Build** button

In the top right of the Chart window is a box that lists all the selector variables used in the Data Grid. This will allow you to highlight data by a certain category.

- Select the **Product B** category

The data points on the chart which relate to Product B are now coloured according to the legend.



Data Grid Scatter Plot Chart

Templates

Market Insight allows you to store certain Toolbox settings as Templates so that you can drag them onto different selections without having to recreate them each time.

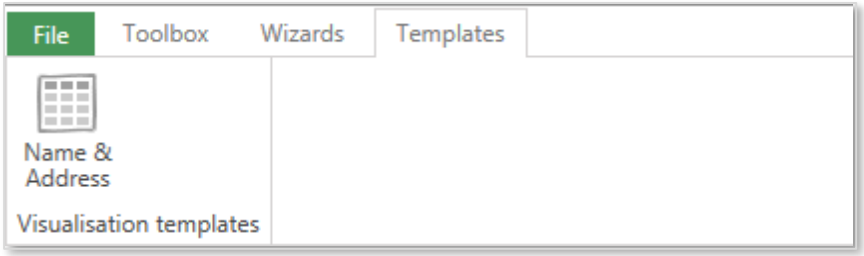
In the previous section the Data Grid was amended to show names and addresses for further selection browsing or as the requirements for Export.

- Rename the **Data Grid** as **Name & Address**
- Drag and drop the **Name & Address** Data Grid by the drag handle icon onto the **Templates** ribbon bar at the top of the screen

This Template can now be dragged onto any selection and will display the Name & Address variables for each record (where licensed).

Templates can also be set up for:

Cube, Chart, Tree, Venn, Map and Report



Data Grid Template

Why was I Selected?

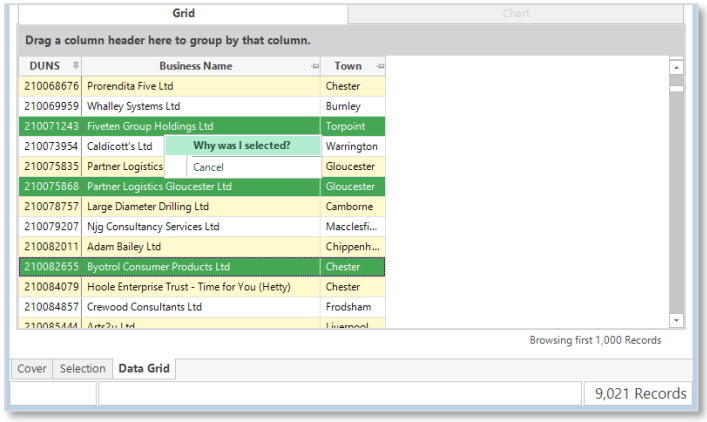
It is possible to identify why a record has been selected using the Why was I selected functionality. To do this ensure that you have the identifier on your data grid that corresponds to the table level of the selection.

- Open a selection of interest and drop the **Name and Address** template on top
- From the **Site** folder in the system explorer drag the **Duns Number** variable on to your data grid
- Highlight the rows you are interested in then right click and select **Why was I selected?**

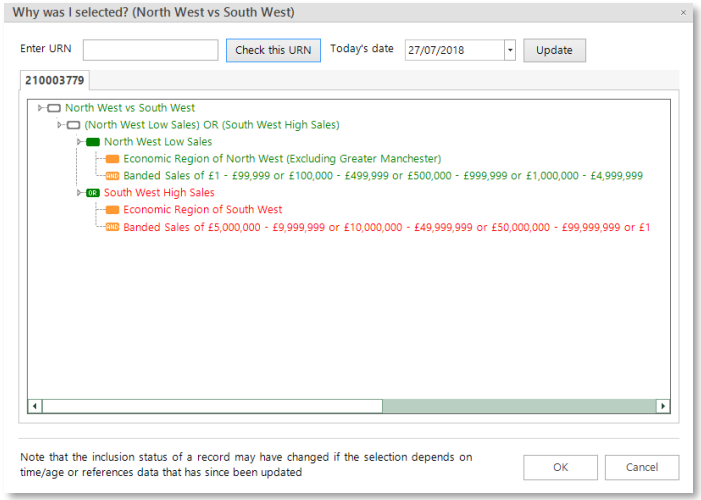
A new window will open up showing you why each record you chose to highlight was selected. The criteria the record met are displayed in Green and those not met displayed in red.

It is possible to enter the URN of a record in the box at the top of the display to investigate why that record was not selected.

It is also possible to select the date you wish to check which of the criteria the record met. This is to take account of the fact if using xmls. It is possible for a record to have moved within a category within a variable. For, example a record may meet the criteria for selection on the current date but when checking the date at which some marketing was sent out it would be possible for the record to have not met the criteria for selection.



Data Grid with highlighted Records



Why was I selected? Window

Word Cloud

The Word Cloud is a visualisation which displays the descriptions of categories from a selector or banded variable, as a “cloud” of words. Those words with the highest counts (or other cube statistic value) for the underlying selection are given the most prominence.

- Redisplay the selection of **Live Policy**
- From the **Toolbox** drag and drop the **Word Cloud** tool onto the open selection
- Drag the variable **Economic Region** onto the drop zone of the **Word Cloud** and click the **Build** button

The display here is indicating that South East (Outside M25) is the most populous Economic Region in the underlying selection.

To show more than one variable displayed on a Word Cloud window the settings can be changed as follows:

- Click on the **Add Dimensions Together** button (This will display another drop box alongside the one set as Economic Region)
- Drag **Legal Status Code** onto the new drop box. Click the **Build** button
- Click **OK** on the restrict results box (By default this will restrict the number of results to the top 200 if required)

The results will now show all the categories for both Economic Region and Legal Status Code shown on the same display as separate entities.

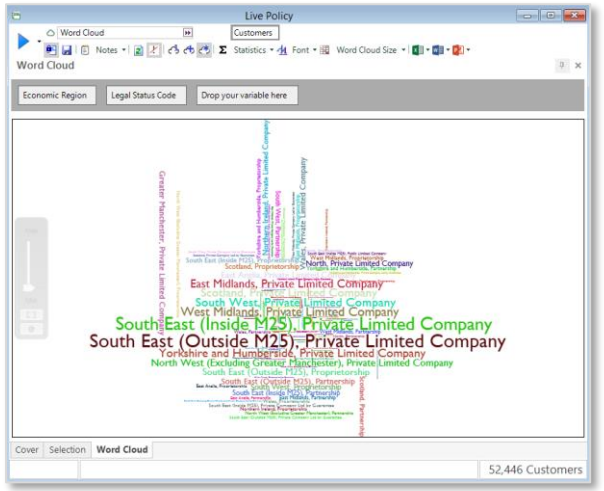
Single Dimension

Add Dimensions Together

To show the relationship between more than one variable displayed on a Word Cloud window, the settings can be changed as follows:

- Click on the **Combine Dimensions Together** button
- Click the **Build** button

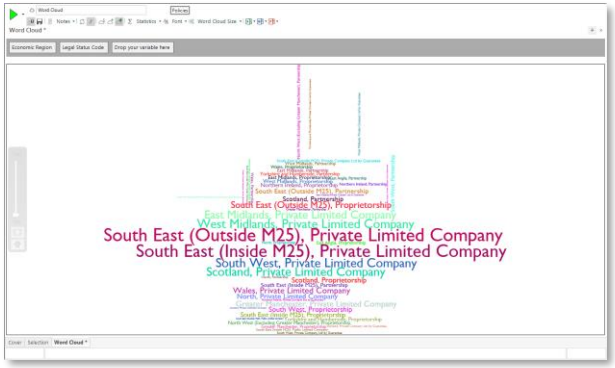
The results will now show all the categories of both variables joined together e.g. South East (Outside M25), Private Limited Company etc.



Combine Dimensions Together

Text variables can also be used in a similar way by "shredding" the content so that the individual words can be displayed. So the content of a series of Facebook status or a Twitter tweet may be analysed.

- Drag on a second Word Cloud and then right drag the variable **Business Name** onto the drop zone
- Right drag the variable **Business Name** onto the drop zone of the existing **Word Cloud**
- From the popup menu select **Add as shredded variable** and click the **Build** button
- Click **OK** on the restrict results box (By default this will restrict the number of results to the top 200 if required)



Shredded Variable

N.B. By right clicking on the variable drop box and selecting Edit, you can define the word length used and define the words to exclude.

For further options and information refer to the Help files... Visualisation – Word Cloud.

Cubes

A Cube is a numeric analysis of your data broken down by one or more of your variables. This can be displayed on either a subset of the data or the whole universe. The results of this analysis can then be used as the basis for further selection or analysis.

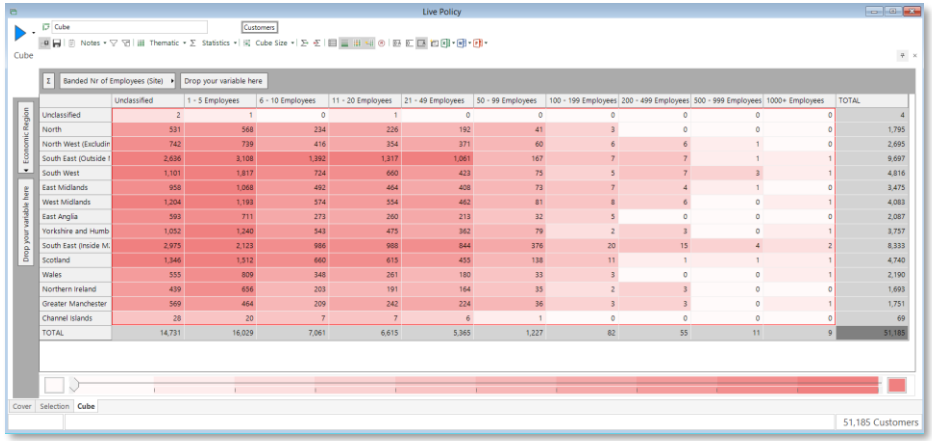
In the following example you will create a basic Cube showing the breakdown of Customers, initially by Economic Region and Banded Nr of Employees based on a selection of Live Customers.

- Use **Customer Status** to make a selection of **Live Policy**
- From the **Toolbox** drag & drop the **Cube** tool onto the **Live Policy** selection window
- From the **System Explorer** drag & drop the **Banded Nr of Employees (Site)** variable onto the horizontal drop zone (labelled "Drop your variable here") on the upper axis of the **Cube**
- Repeat the process dragging the **Economic Region** variable onto the vertical drop zone
- Click the **Build** button to build the table

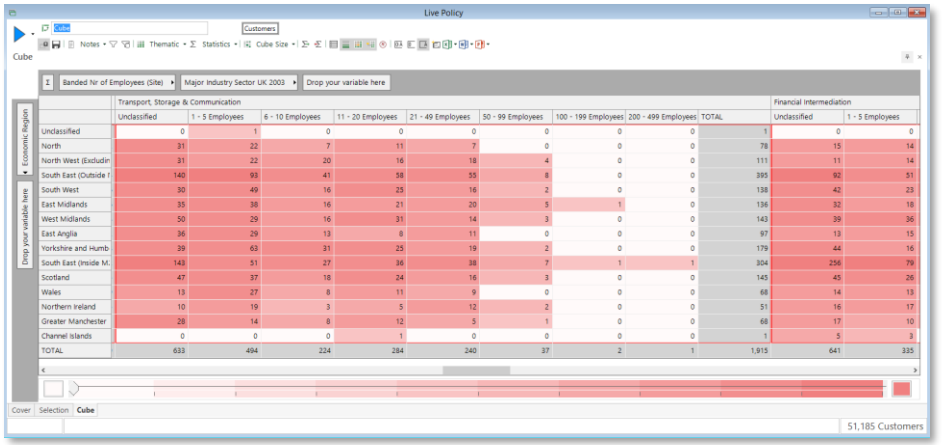
It may be interesting to breakdown the display further and include Major Industry Sector in the analysis.

- Drag the **MIS** variable onto the box next to **Banded Nr of Employees (Site)** and rebuild the table

N.B. Cubes can have as many dimensions as the memory on your PC can support.



Cube Using ER & BNE Variables



Cube Using ER, BNE & MIS Variables

Saving Your Cube

As with Selections before saving your Cube for re-use at a later date it makes sense to give it a logical name. This process is the same for the other tools.

- Highlight Cube in the top left hand corner of the window and type – **ER v BNE v MIS** - and then click away

You can now save your newly named Cube:

- Click on the icon next to the **Cube** name and drag and drop on to a relevant folder in the **File Explorer** window
- Close the currently open **ER v BNE v MIS** window and drag and drop the saved **Cube** back on to the work space

Changing the Information Displayed

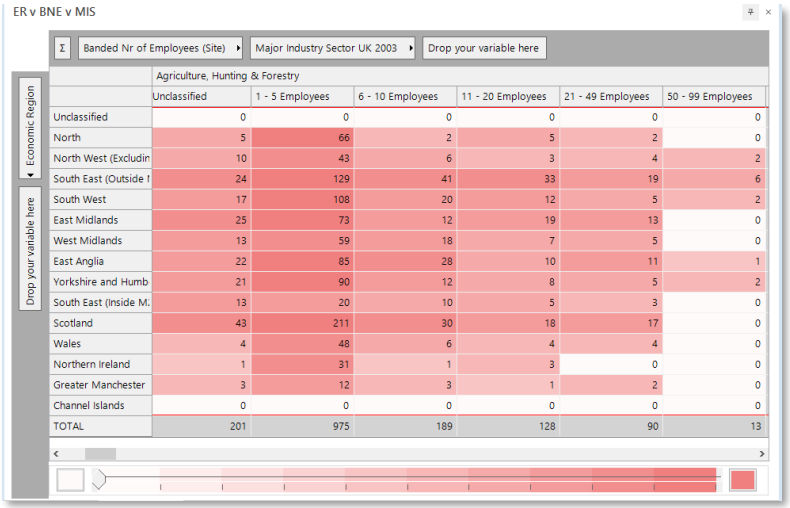
By default a cube will show the record count. However by using the Statistics button you can specify different or additional information to display.

- Click on the **Add Statistics...** button from the Σ Statistics window
- Choose the **Statistic** you want to display from the drop down list and click **OK**

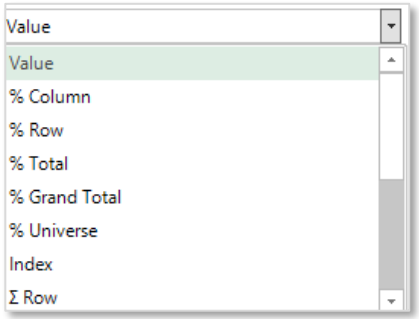
In the example opposite each row now displays a percentage figure as well as the count. You will also note that the Thematic shading on the table is being applied to the Count figure.

You can also scroll through the statistic display options without adding to the display by using the Σ Σ buttons.

Renaming a Cube before Saving



Cube Displaying Count & % Column Figures



Cube Statistics

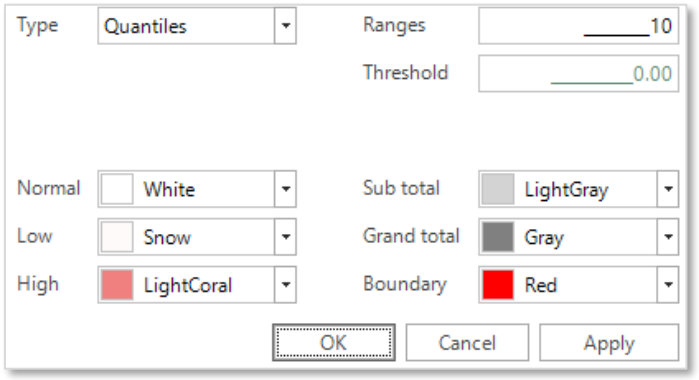
Thematic Shading

Thematic shading is a visualization technique used to highlight the numeric distribution within the Cube result. Thematic shading allows easy and quick interpretation of Cube results. You can control the range of colours used and the method of assigning cell colours based on one of the numeric results.

The default thematic shading option is set to Quantiles with 10 ranges i.e. deciles.

- Click the **Thematic** button to reveal the menu opposite

Change the Type and Colour settings to see the different effects that can be produced.



Thematic Window

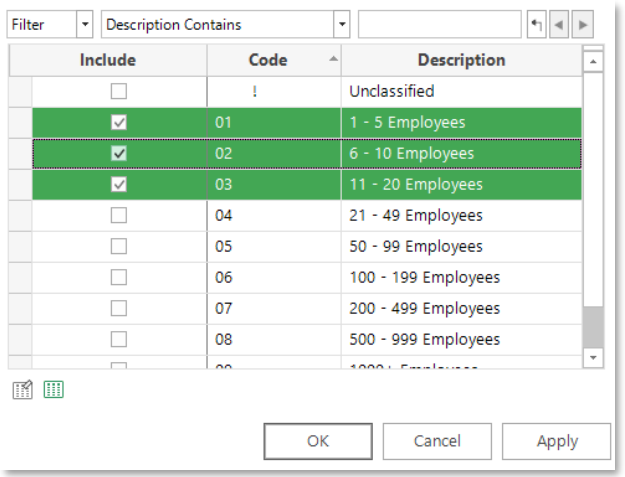
Filter Row & Column Values

You may want more control over which values are displayed in a Cube. One way to do this is to restrict the values shown. In this example you will narrow the Emp Here Range display to just 3 ranges.

- Click on the black arrow beside the **Banded Nr of Employees (Sites)** box within the Cube window

- From the pop up window **Reset** the selection and tick **1-5, 6-10** and **11-20 Employees**

- Click **OK** to show the changes on the Cube



Variable Filter Window

Selecting Cells

With your Cube in place you can now select the data displayed in a number of different ways:

- Drag across a number of contiguous cells or use Shift-Click and Control-Click to choose non-contiguous areas

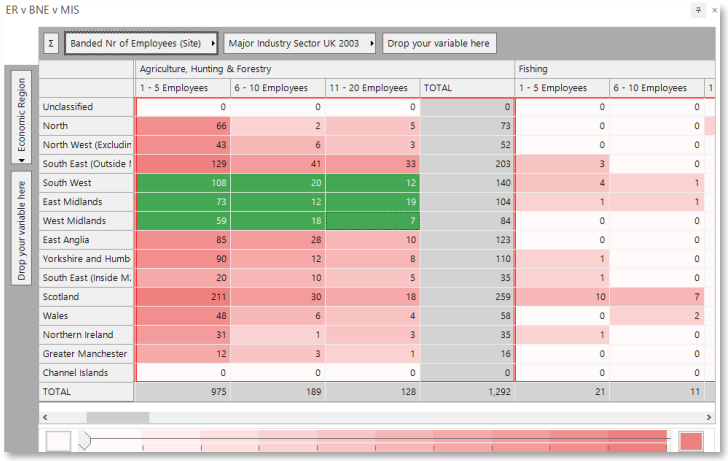
- Click on any one of the highlighted cells and drag onto the work space. This will create a new selection rule made of the underlying selection the cube analysed, further restricted to the cells chosen. Count the new selection to see the total you have selected

Thematically Shaded Cells

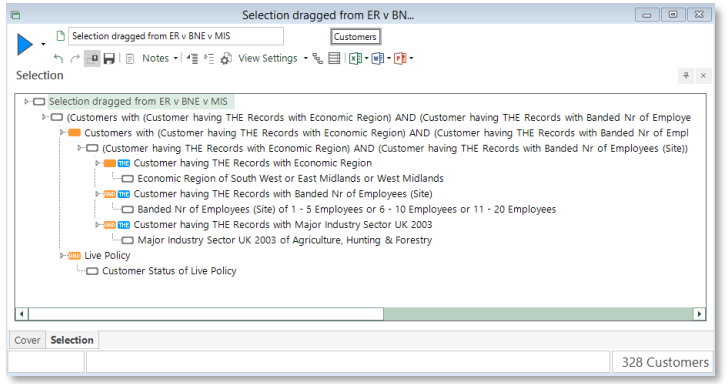
- Use the right hand part of the **Slider** button at the bottom of the window to gradually select the coloured cells as you progress. Alternatively move the whole button to the end then you can move backwards selecting the highest value cells

- Click on one of the highlighted cells and drag onto the work space. Count the new selection to see the total you have selected

Sometimes it is more appropriate to view your data in a graphical representation. The next section will guide you through how to display your data in the form of a Chart.



Cube Showing Highlighted Cells



Selection Dragged from a Cube

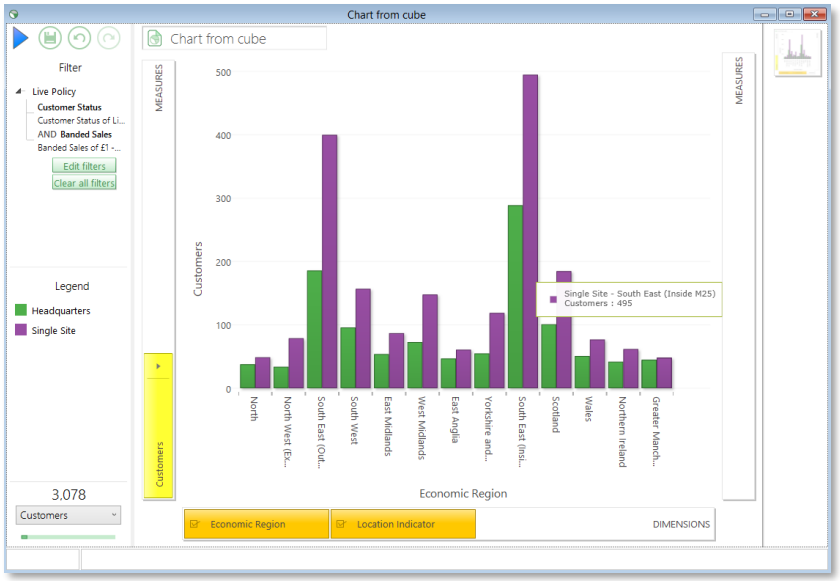
Charting

The Charting tool does not only allow you to graphically represent existing identified records but also allows you to visually explore your data. You may prefer to build your display by visualising your variables rather than using them to create a selection.

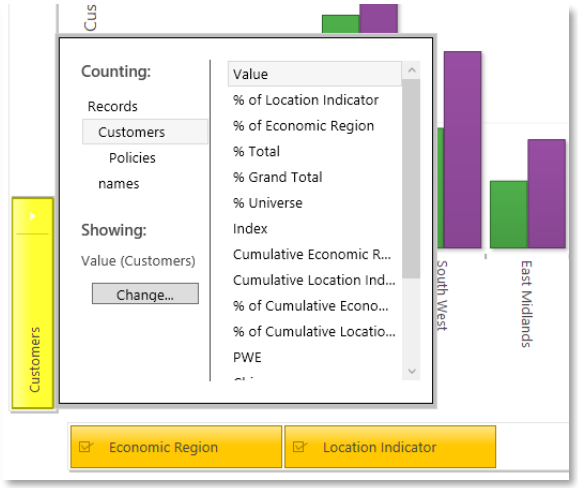
However we will start by taking identified records and demonstrating how they can be graphically displayed.

- Create a **Cube** based upon the selection, **Customer Data Status** (Live policy) AND **Banded Sales** (£1 - £99,999 through to £1,000,000 - £4,999,999)
- Use **Economic Region** on the vertical axis and **Location Indicator** on the horizontal axis
- Click the **Build** button
- Click and drag the **Cube** button onto the **Charting** tool on the **Toolbox** ribbon bar. Click the **Build** button on the **Charting** tool

By default the data is displayed as a clustered column chart. Use a Chart when the visualisation of data will illustrate things more effectively than a table of numbers.



Default Column Cluster Chart



Counting Level and Statistics

The Charting Window

To the left and bottom of the chart are 2 bars:

Measures – by default this will display what is being counted e.g. Records, Names etc. Click on the default box to select a different counting level or statistic

Dimensions – this displays the variables used to break down the data e.g. Economic Region, Location Indicator etc.

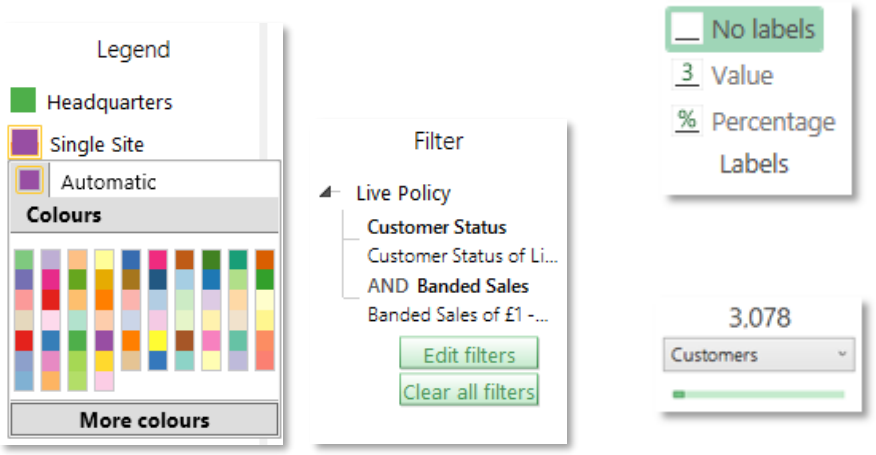
The panels to the left of the charting window show:

Filter – selections that are used to restrict the results

Legend – colour coded to the chart display. Should business or cultural reasons require you to use specific colour combinations rather than those set as the defaults, simply click on the colours in the legend to access a colour palette to select from. Any selected colours will be retained for the individual user until changed again

Count – the total number of records represented in the display

Labels – choose to add/remove values and percentages



Charting Window – Filter, Legend & Count

Charting Window – Analysis Trail

The panel to the right of the charting window shows:

Analysis trail – a record of the key steps taken within a particular charting window. Mouse over a thumbnail image to review any of the different steps taken, or click on an image to open and return to a particular chart display.

Chart Types & Combinations

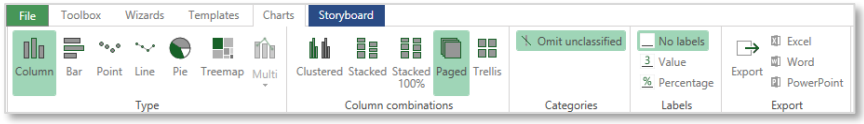
When a Charting window is open a new tab will appear on the ribbon bar called Charts.

From here different chart types can be selected and the way in which the information can be combined for that chart.

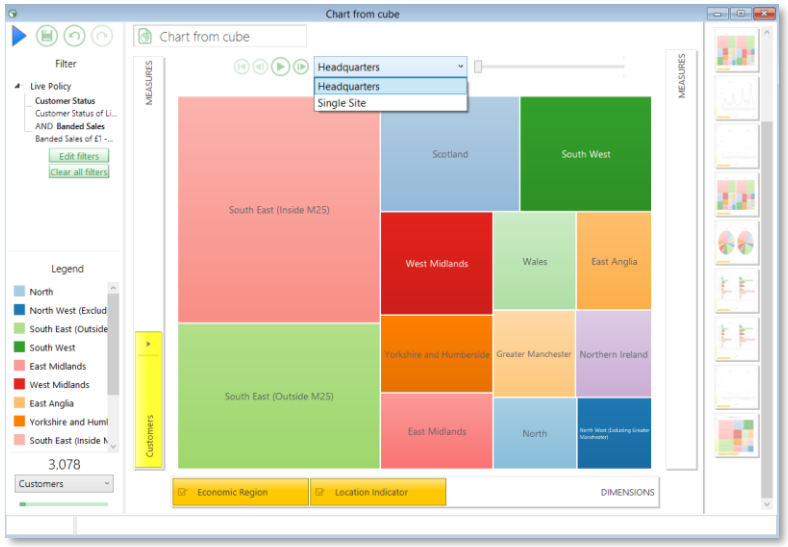
For example if you select a Paged Treemap you will get the opportunity to animate the display as it cycles through the different Location Indicators.

By moving the mouse pointer over the different elements of the chart you will see a tooltip that describes that element and the count it represents.

Spend some time experimenting with the chart types. Notice that a variety of chart **Combinations** can be applied to 2 dimensional charts.



Ribbon Bar – Charts Tab



Animation Controls

Multi-Measure Chart

It is possible to apply multiple measures to a single dimension chart.

- Return the chart to a clustered column chart
- Right click on and remove the **Location Indicator** dimension
- Click on the black arrow next to the measure on the left hand measures bar and change the measure to records
- Drag **Customer Level revenue** onto the right hand **Measures** drop box and build

If you wish to see the same measure with a different statistical calculation applied

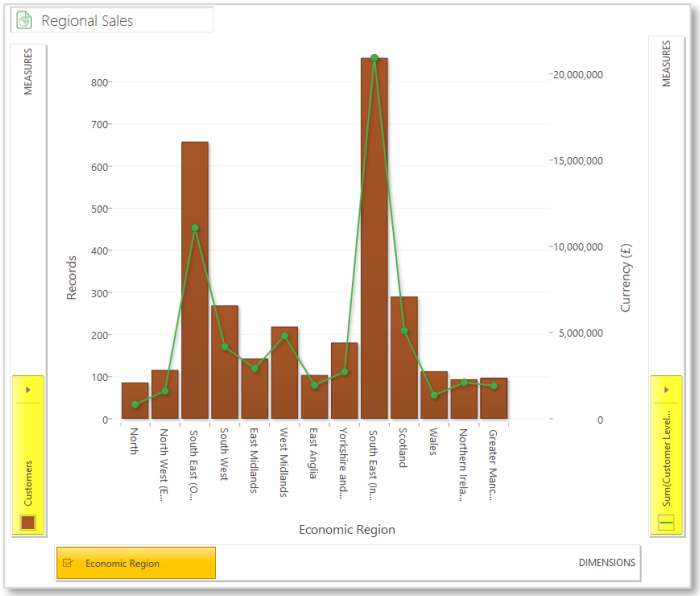
- Click on the arrow next to **Sum (Customer Level Revenue)** and change to **the required statistic**

or

- Right drag the **Customer Level Variable** and drop it on the right hand measures bar. Chose the **required statistic**
- Click the **Build** button

To change the appearance of a multi-measure chart:

- Click on the drop down arrow below the **Multi** icon, select from the available options and **Apply** the changes



Charting Window – Multi-Measure Chart

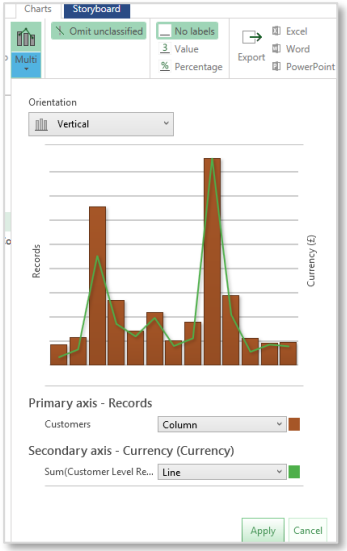


Chart Appearance Options

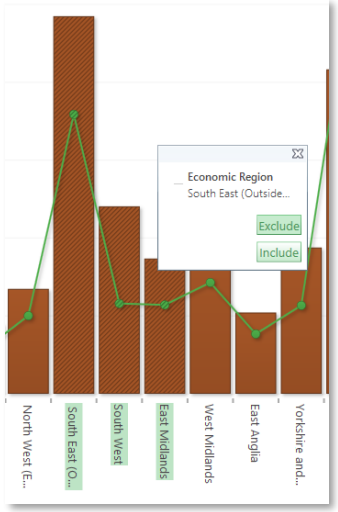
Exploring Data Using a Chart

To visually explore the data to achieve the same outcome (but restricted to 3 Regions) as in the previous example, we can start with a blank chart.

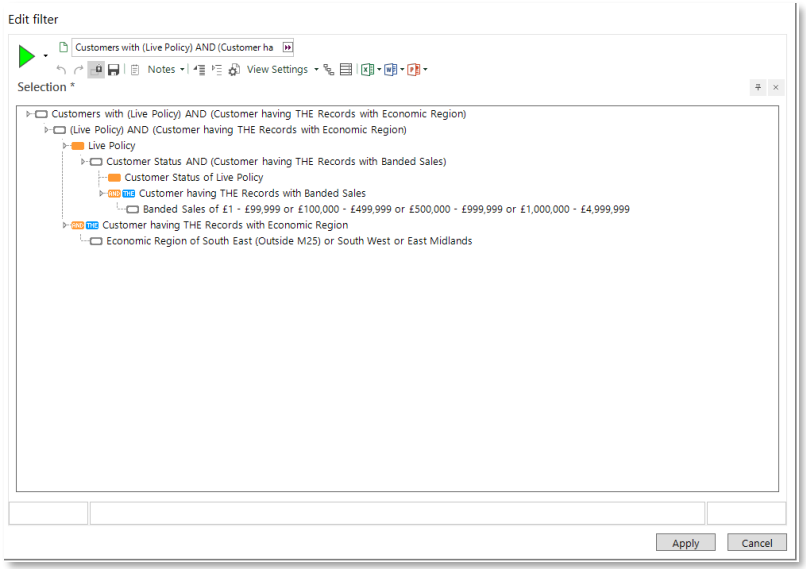
- Click on the **Charting** icon on the **Toolbox** ribbon bar
- Add the variable **Economic Region** to the **Dimensions** axis and click the **Build** button
- Control click on the **South West, East Midlands & West Midlands** columns which will cause an **Include** box to appear. Click **Include** to add the regions to the **Filter**
- Drag the **Location Indicator** variable next to the **Economic Region** on the **Dimensions** axis. Click the **Build** button to update the display

We are now looking at all records in these regions in terms of their location indicator.

- To restrict the records to those who are **Live Customers** in certain sales bands, click the **Edit filters** button
- Drag the **Customer Status** variable onto the selection window and select **Live policy**
- Now drag on the **Banded Sales** variable and select **£1 - £99,999 through to £1,000,000 - £4,999,999**
- Click **Apply** and then the **Build** button to update the display



Include to the Filter



Edit Filter Selection Window

Exporting a Chart

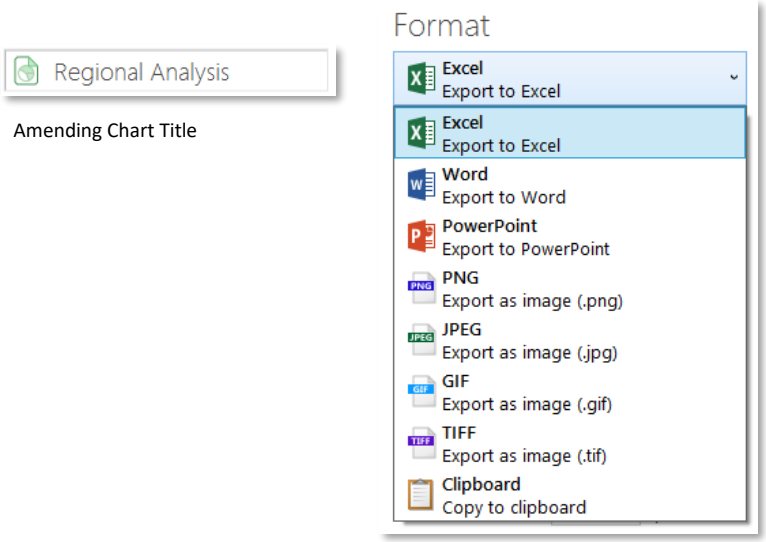
Before exporting a chart it is good practice to give it a relevant description.

- Click on the New Charting heading and amend as required

- Click on the **Export**  icon on the **Charts** tab

From this window you can select to transfer the image directly into a Microsoft Excel, Word or PowerPoint template, select from a number of image files formats or copy to the clipboard.

- Once a format has been selected click on the **Export** button



Amending Chart Title

Export Window

Trees

A Tree is a nested representation of a multi-dimensional cube. The cells are calculated in the same way as a cube but the dimension categories are represented as nodes in a tree.

Here you will recreate an example similar to the one used to demonstrate Cubes to view the differences when using a Tree.

- Create a selection of **Customer Status - Live Policy** on the workspace and then drop the **Tree** from the **Toolbox** onto it

There are 2 possible views to select from – **Collapsible Tree** and **Flattened Tree**. Select the Collapsible Tree option.

- Drag the **Economic Region** variable onto the first drop zone and then repeat with the **Banded Sales** variable

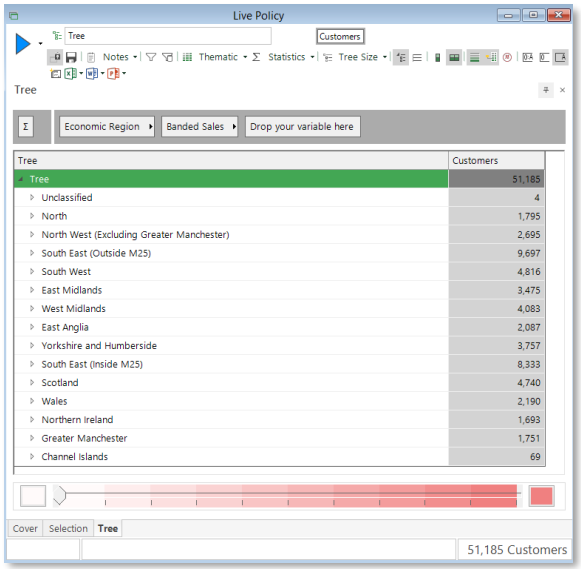
- Click on the **Build** button

Initially the breakdown of cells is shown by the first dimension (Economic Region). Each cell can be opened by clicking on the plus sign to reveal the breakdown by the second dimension (Banded Sales). In this way you can delve into the more interesting areas of the results cube without being overwhelmed by the number of cells.

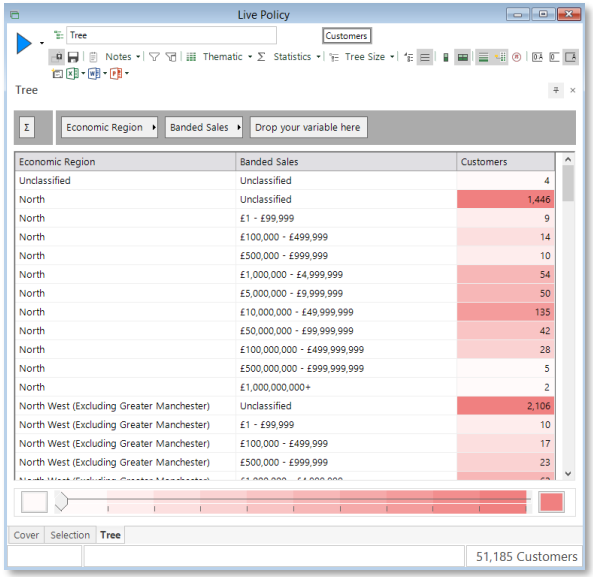
- Click on the + sign next to the **North** category

The cells displayed show the Economic Region broken down by their sales banding.

Thematic shading and the filtering of values operate in the same way as described for Cubes.



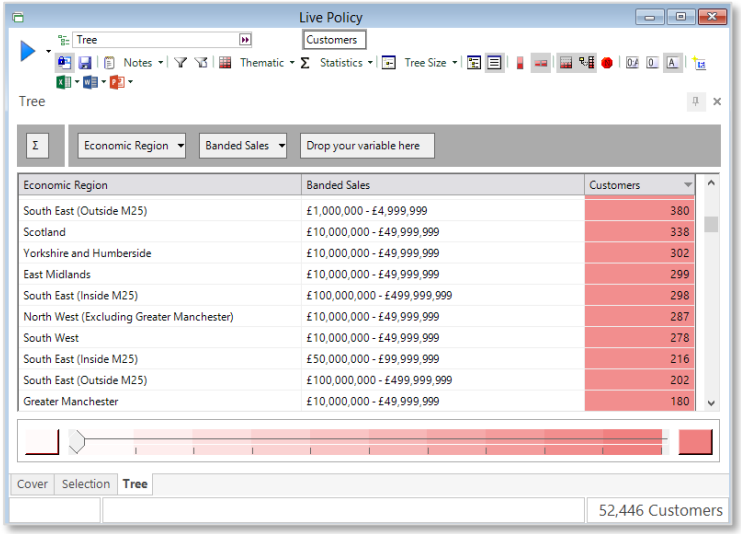
Collapsible Tree View



Expanded Collapsible Tree

A Tree may also be transformed into a 'flattened' view. This will result in all cells being displayed and referenced by their dimension coordinates. This is particularly useful if combined with sorting by the Count to reveal the most highly populated cells.

- Click on the **Flattened Tree** button
- Right click on the **Count (Customers)** column header and select **Sort Descending**



Flattened Tree View

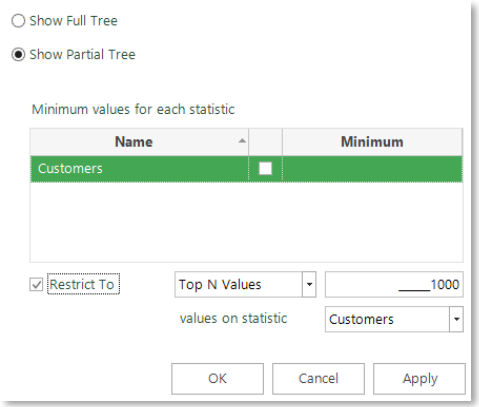
It is also possible to narrow down the display on a Tree by specifying a minimum value for each of the statistics used and/or by applying a Top or Bottom N figure.

- Click on the Tree Size **Tree Size** button
- Select the **Show Partial Tree**

It is now possible to further restrict the display by applying a Top N function.

- Tick the **Restrict To** N Values box
- Enter **100** as the number of values to restrict to and **Sites** as the statistic to which to apply the restriction. Click **OK**
- Click on the **Build** button

You can select cells in the same way as shown in the section on Cubes.



Showing the Tree Size Window

Venn Diagrams

A Venn diagram gives a colourful, graphical representation of the way in which data interrelates. It is very useful in the segmentation of the data, for example when creating target groups for mailings. The name comes from John Venn a 19th century British logician who devised the notion.

Up to five sets can be used in a Venn diagram. Each is represented by a coloured ellipse and intersections are shown in a different colour. Any coloured section (or background) may be dragged onto the workspace to be examined as a selection rule.

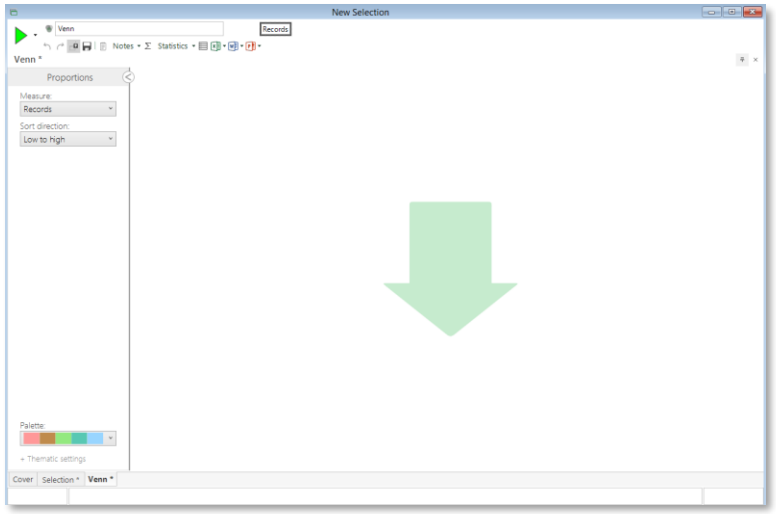
Before you start on your Venn create and save the following 3 sets in your Private Folder in the File Explorer window:

- **Selection 1** – Records where the **UK Postcode Area** is Birmingham
- **Selection 2** – Records where the **Major Industry Sector UK 2003** is Manufacturing
- **Selection 3** – Records where the **Banded Nr of Employees (Company)** is 1-5 through to 21-49 Employees

You can use these selections to explore the workings of a Venn.

N.B. Ensure your underlying selection window and the selections you create are at the correct table level to display your results.

- Drag & drop a **Venn** onto the work space from the **Toolbox**
- Now drag and drop each of the selections in turn onto the **Venn** window then click the **Build** button to see the results



Blank Venn Window

3 Way Venn Diagram

As you dropped each selection onto the Venn you will have noticed a label appear alongside the set drawn and a count when built. Further actions can be performed when you click on the label:

- **Edit description**
  In the new window that appears enter your new description and click Save

- **Edit selection**
  The selection window will appear. Amend your selection as appropriate and click OK

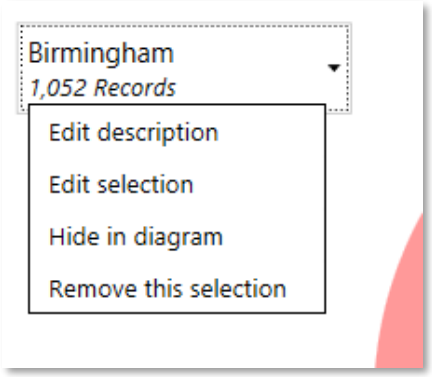
- **Hide in diagram**
  Selecting this option will hide this segment from the Venn diagram

- **Remove this selection**
  Clicking on this option will remove the set from the Venn diagram

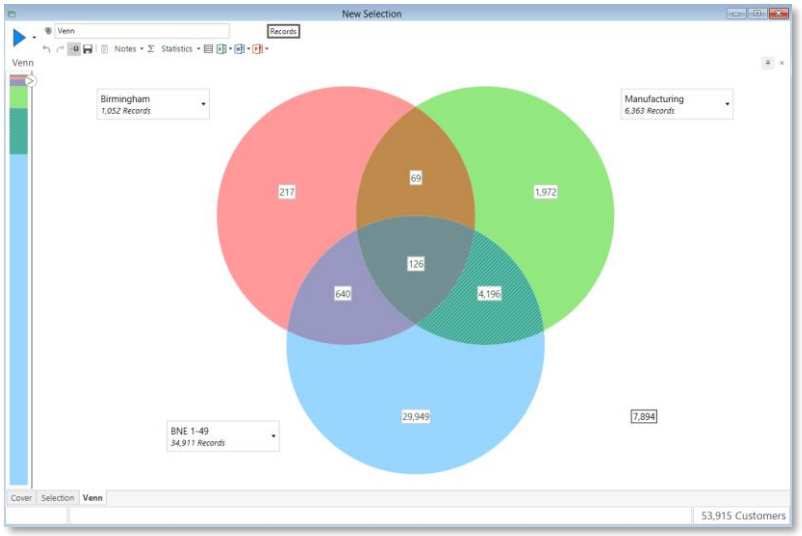
By moving the mouse pointer over the relevant segment a pop up display will strike through any selections of which that particular segment is <u>not</u> a member. This is very useful if you have the maximum number of data sets being displayed.

In the image opposite a segment has been highlighted with the corresponding coloured part of the bar to the left also highlighted. This bar is visually representing the proportion of data in each segment.

The arrow at the top of the proportion bar  will give you access to further settings.



Venn Information Boxes



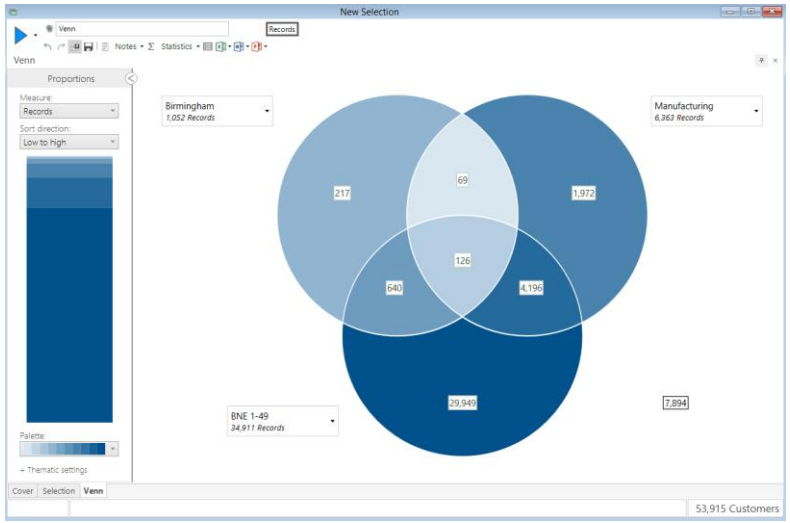
Highlighted Segment Shown on the Proportion Bar

An alternate display to the multi coloured sets is to use a single colour scheme.

- Click on the 

Palette drop down arrow. Select a single colour scheme

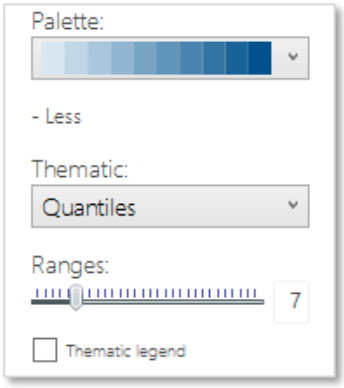
Using a single colour scheme allows you to use it as a thematic shading display. The higher value segments have the darker shading.



Venn Diagram – Single Colour Thematic Shading

If you click on the **+Thematic setting** button you can change the way in which the shading can be applied.

By default Quantiles is used so that each segment receives a distinct shade of the colour chosen. Alternatively you can use Equal Ranges which may cause some segments to be coloured with the same shade. If you check the **Thematic legend** box a legend will display alongside the main diagram.



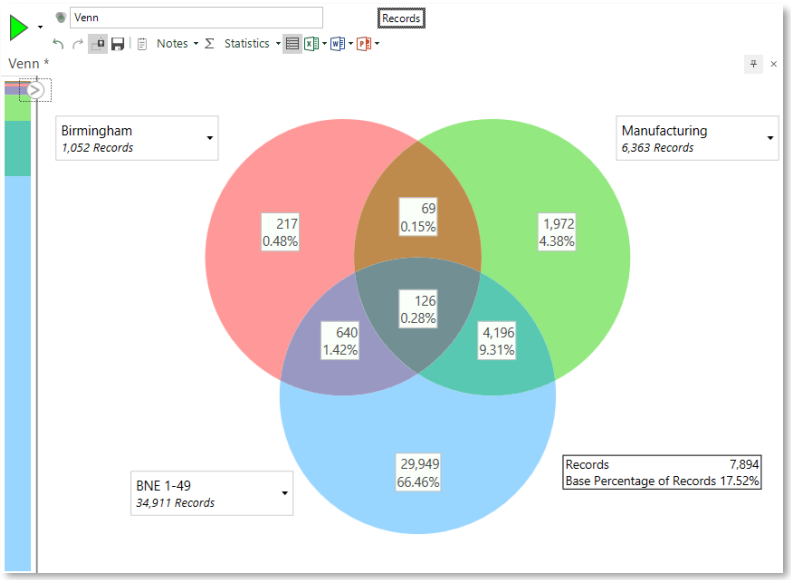
Thematic Settings

To display the results as a percentage statistic:

- From the **Statistics** button click on the **Add Statistics** option. Change the **Display** from **Value** to **Percentage**. Click **OK**

This will display an additional value of a percentage of the base selection. You also have the option of displaying a percentage of the values within the segments or as a percentage of a particular segment.

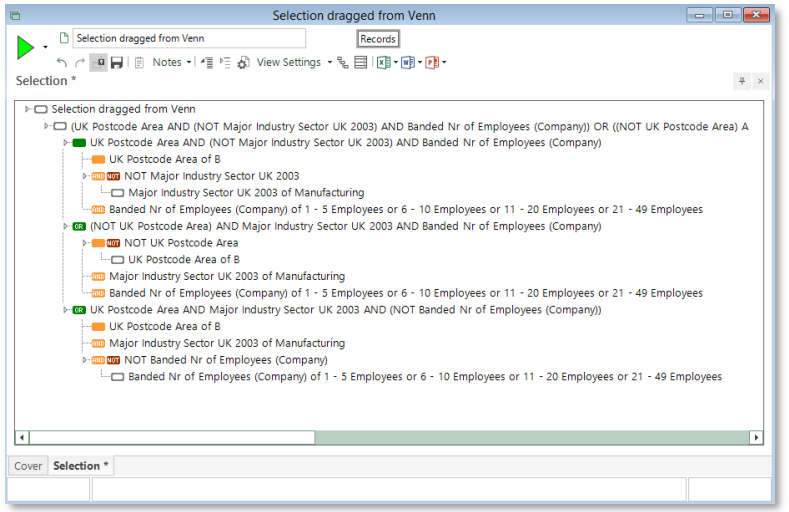
- Click on the **Show Statistics Legend** button



3 Way Venn Diagram with Count & Percentage Figures

- Click on a segment or ctrl click on multiple segments on the Venn and then drag onto to the workspace.

This will create a selection query to identify the records in the segments selected. The selection can now be built, saved or edited as shown previously.



A Selection Dragged from A Venn Diagram

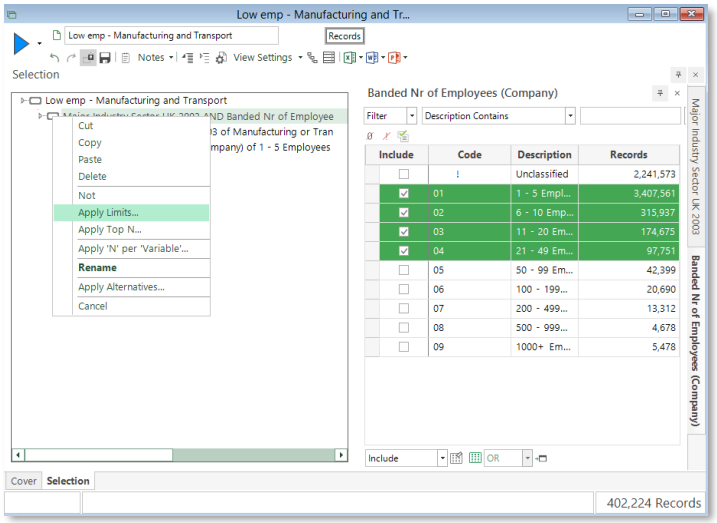
Sampling

There are a number of ways of limiting the number of records selected – for example to undertake a test mailing with a small proportion of the data prior to a full rollout. You can use the Top N function or Limits within a selection window or to specify limits on a Data Grid view.

Limits

You can apply a sampling limit to any clause of a selection tree.

- Open a saved selection.
- Right click on a clause (or the summary line to apply to the entire query) and choose **Apply Limits…**



Selection with Right Click Menu – Apply Limits…

All – This is the default setting and applies no limit. Use this setting if you wish to remove a previous limit.

First – Will take the first N records.

Regular (Stratified) – Will take a regular sample of the selected records (e.g. take 1 skip 9, take 1 skip 9 etc.)

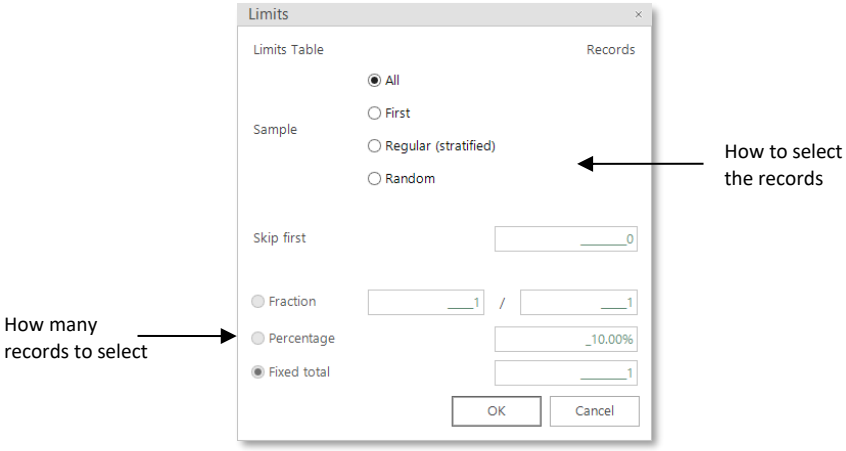
Random – Uses a random decision to select each record.

Skip First – Optionally skip the first N records.

Fraction – Option to enter sample as a fraction e.g. ½, ¾

Percentage – Option to enter sample as a percentage e.g. 50%, 75%

Fixed Total – Allows you to specify when to stop outputting records.



Limits Window

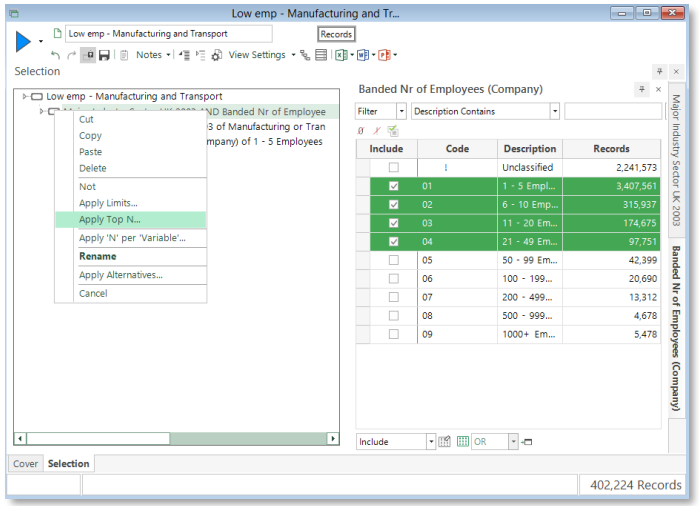
Top N

Who are my top 100 customers? A frequently asked question but one that is normally surprisingly difficult to answer using selection query tools. Using Top N enables you to identify the top or bottom N records by an ordered variable. Top N can be applied to any clause of the selection tree.

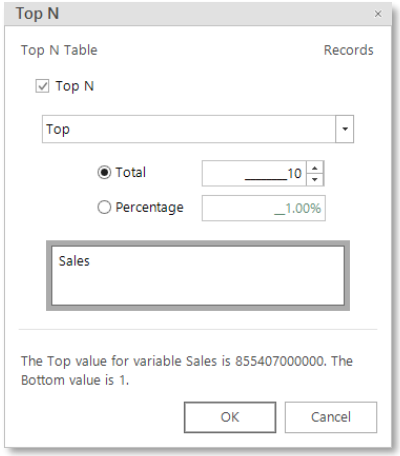
The Top N criteria are applied after all other Market Insight selections have been completed so that you can isolate the segment and then pick the top (or bottom) N or N% records.

- Close any selection windows open and display the **Low Employee Retail Birmingham** selection
- Right click on the selection name at the top of the logic tree and select **Apply Top N…**
- Tick the **Top N** box and drag and drop the **Sales** variable into the grey bordered box
- Type 10 as the **Total** records to be returned
- Click **OK**

N.B. Non sequential variables can now be ordered by the User when using Top N. The variable used must come from the same table level as the selection or a higher table.



Selection with Right Click Menu – Apply Top N…

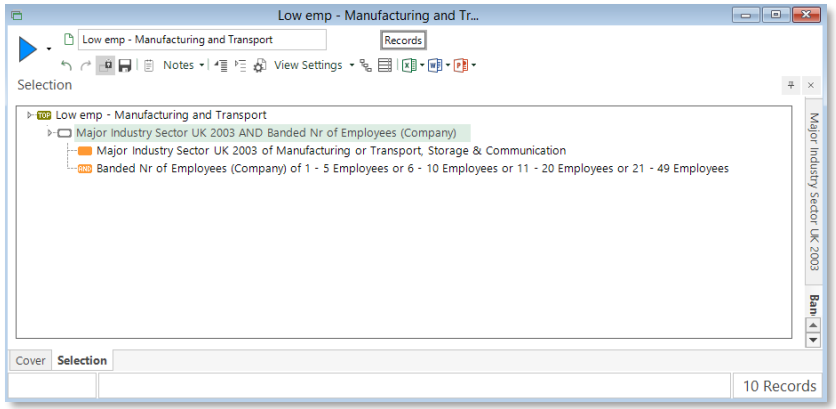


Top N Window

Notice that the selection now has a new icon next to it called TOP. To see the results:

- Click the **Build** button to return the number of records. (10 Sites)
- Drag the **Name & Address** template onto the selection and then count to see the individual top 10 Records
- To confirm they have high sales numbers drag the **Sales** variable onto the grid and click **Build**
- Right click on the **Sales** column and select **Sort Descending**

N.B. If no information is showing in the Data Grid remember you have to License records to view them.



Selection with Top N Applied

N per Variable

There may be some circumstances where records share an attribute and you wish to only select say 1 record. If a contact shares an email address you may want to select just 1 contact per that email address.

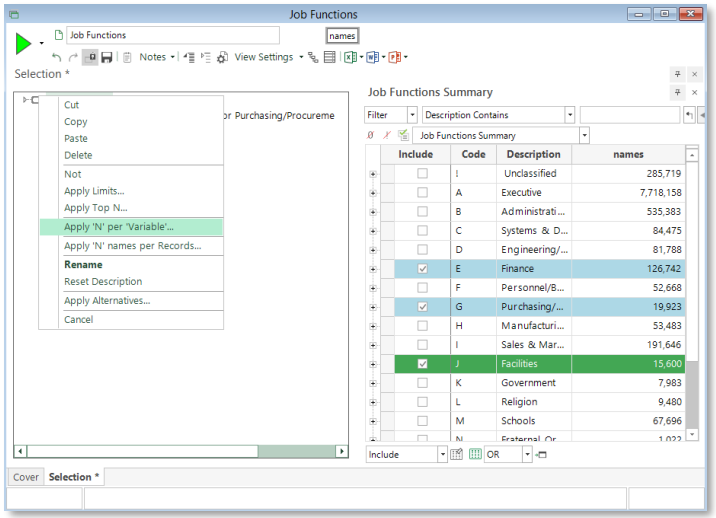
It is also possible to use a further variable to prioritise who of the multiple contacts should be selected.

An information row will appear at the bottom of the window to indicate the range of values applicable.

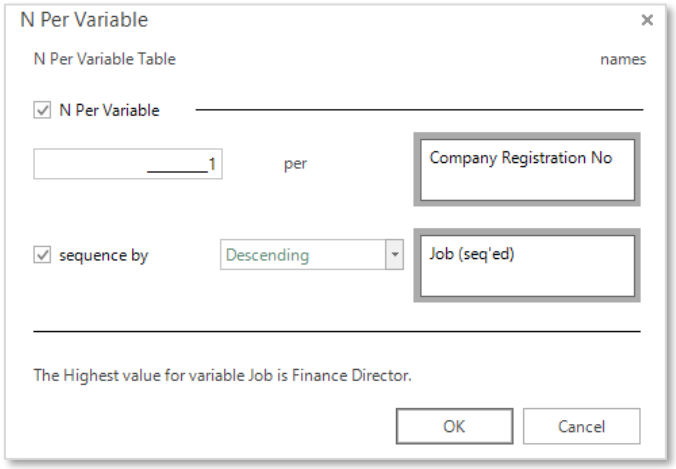
N.B. Only variables from the table level you are working at (or ancestor tables) can be used with this function.

N.B. Non sequential variables can be ordered by the User when using Top N and N Per. The variables used must come from the same table level as the selection or a higher table. See the N Per section for an example.

Notice that the selection now has a new icon NPT next to it called NPT, indicating that N Per sampling is in effect.



Selection with Right Click Menu – Apply N Per Variable



N Per Variable Window

N Per Table

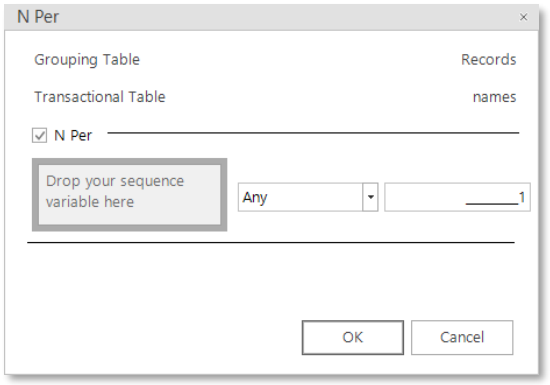
When compiling a selection for a mailing often there is a requirement to ensure the result is limited, for example, to 1 contact per site.

- Make a **Names** level selection on **Functions** and select **Marketing**
- Click on the **Build** button to see the results
- Right click on the **Summary** row at the top of the logic tree and select **Apply 'N' Names per Records**… Leave the default settings on the pop up window and click **OK**
- Click on the **Build** button to see the results

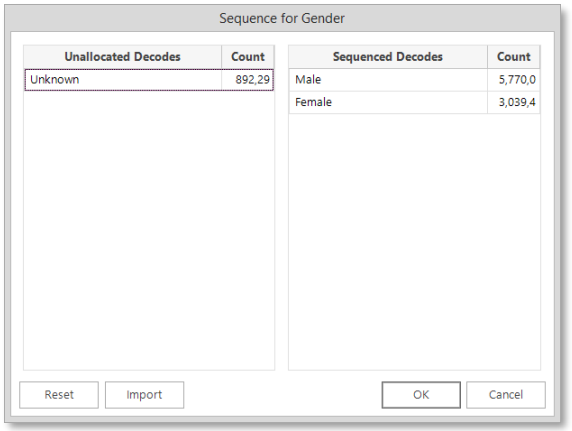
The result will now reflect only 1 contact at a site chosen by whoever is first found. If you want to make the choice of the person selected say by Gender:

- Redisplay the **N Per** window by right clicking on the line with NPT and select the **Modify** option and change the **Any** to **First**
- Drag the **Gender** variable onto the drop zone to be presented with a window in which you can order the categories
- Double click on the categories to present them in order of importance and then click **OK**
- Click **OK** on the main **N Per** window and then click the **Build** button

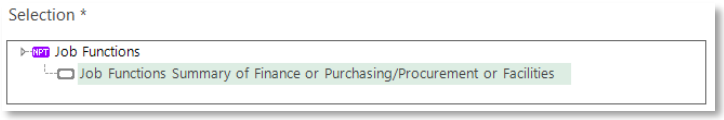
The result will now show only 1 name per record for a Marketing function with prioritization based on Gender.



N Per Window



Decode Sequence Window



Selection with N Per Applied

Market Insight & Microsoft Products

Market Insight offers a seamless integration with Microsoft Word, Excel and PowerPoint allowing you to transfer information from Market Insight into your commonly used desktop programs.

- Drag and drop the saved selection **Low Employee Retail Birmingham** onto the workspace
- Click on the **Word** button at the top of the window

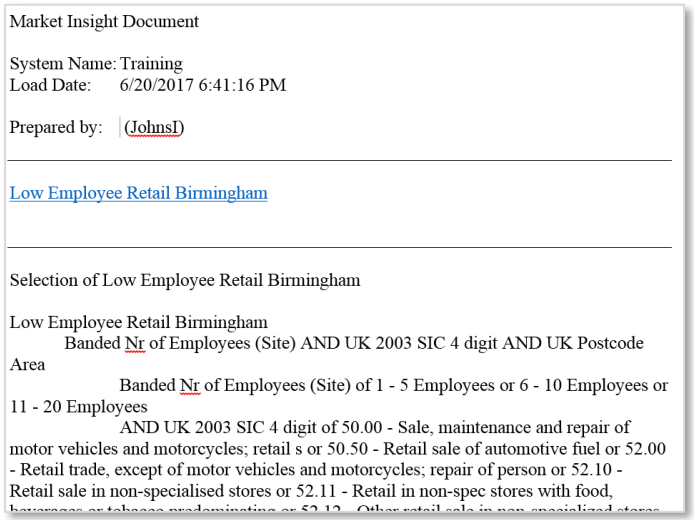
Details on the selection and Count are transferred into a Word document.

- Return to the **Market Insight** window
- Drag and drop a **Cube** onto the selection
- Add **Banded Sales** to the horizontal dimension and **Banded Nr of Employees (Company)** to the vertical dimension
- Click the **Build** button
- Click on the **Transfer** to **Excel** button at the top of the window

Details of the Cube have been transferred to an Excel worksheet ready for you to further manipulate the figures if you so wish.

The same principal applies to using PowerPoint.

N.B. If you perform successive transfers to Word or Excel the items are appended into a single document or workbook, providing an easy to create train of thought report.



Market Insight Document

System Name: Training
Load Date: 6/20/2017 6:41:16 PM

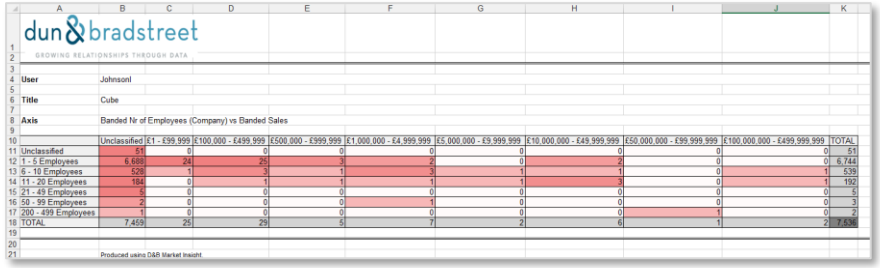
Prepared by: (JohnsI)

Low Employee Retail Birmingham

Selection of Low Employee Retail Birmingham

Low Employee Retail Birmingham
Banded Nr of Employees (Site) AND UK 2003 SIC 4 digit AND UK Postcode Area
Banded Nr of Employees (Site) of 1 - 5 Employees or 6 - 10 Employees or 11 - 20 Employees
AND UK 2003 SIC 4 digit of 50.00 - Sale, maintenance and repair of motor vehicles and motorcycles; retail s or 50.50 - Retail sale of automotive fuel or 52.00 - Retail trade, except of motor vehicles and motorcycles; repair of person or 52.10 - Retail sale in non-specialised stores or 52.11 - Retail in non-spec stores with food,

Transfer to Word Example



dun & bradstreet
GROWING RELATIONSHIPS THROUGH DATA

User	JohnsonI
Title	Cube
Axis	Banded Nr of Employees (Company) vs Banded Sales

	Unclassified	£1 - £99,999	£100,000 - £499,999	£500,000 - £999,999	£1,000,000 - £4,999,999	£5,000,000 - £9,999,999	£10,000,000 - £49,999,999	£50,000,000 - £99,999,999	£100,000,000 - £499,999,999	TOTAL
Unclassified	51	0	0	0	0	0	0	0	0	51
1 - 5 Employees	6,688	24	25	3	2	0	2	0	0	6,744
6 - 10 Employees	529	1	3	1	3	1	1	0	1	539
11 - 20 Employees	184	0	1	1	1	1	3	0	1	192
21 - 49 Employees	5	0	0	0	0	0	0	0	0	5
50 - 99 Employees	2	0	0	0	1	0	0	0	0	3
200 - 499 Employees	1	0	0	0	0	0	0	1	0	2
TOTAL	7,459	25	29	5	7	2	6	1	2	7,536

Produced using D&B Market Insight

Transfer to Excel Example

Mapping – Microsoft Bing Maps

A Map is a visualization of the geographical breakdown of a subset of the database. Market Insight gives you the ability to thematically shade or plot records depending upon your data. On first use of this module change the World Region to Europe by clicking on File – Tools – Options – Map – Map region.

Thematic Map

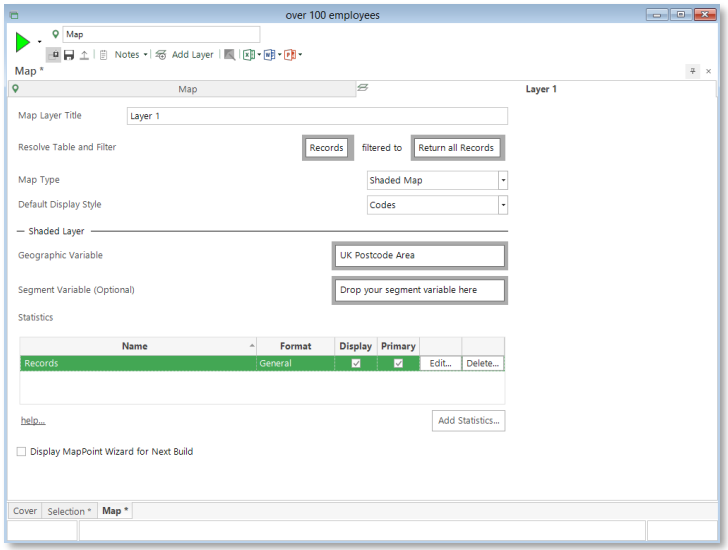
Use thematic shading to look at the geographical spread of Records with 100 employees or more.

- Create a selection on **Banded Nr of Employees (Company)**
- Drag the Map icon onto your selection
- Click the **Layer 1** tab to apply the settings to your Map. Set **Map Type** to **Shaded Map** and **Default Display Style** to **Codes**. Drag the **UK Postcode Area** variable onto the **Geographic Variable** box
- Click the **Build** button

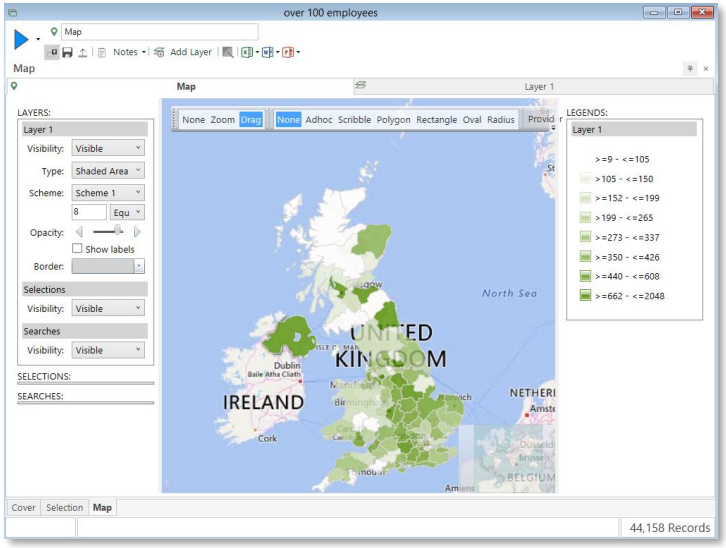
The legend on the left hand side of the window indicates the numbers to be found in the differently shaded Postcode Areas.

To zoom in further drag across a part of the Map you wish to view and click within the outline area

- Use the radius tool to select an area. Right click and drag from within the radius to the workspace then click the **Build** button



Settings for a Shaded Map



Shaded Map

Plot Map

Use the plot map function to display pins to represent records on the display.

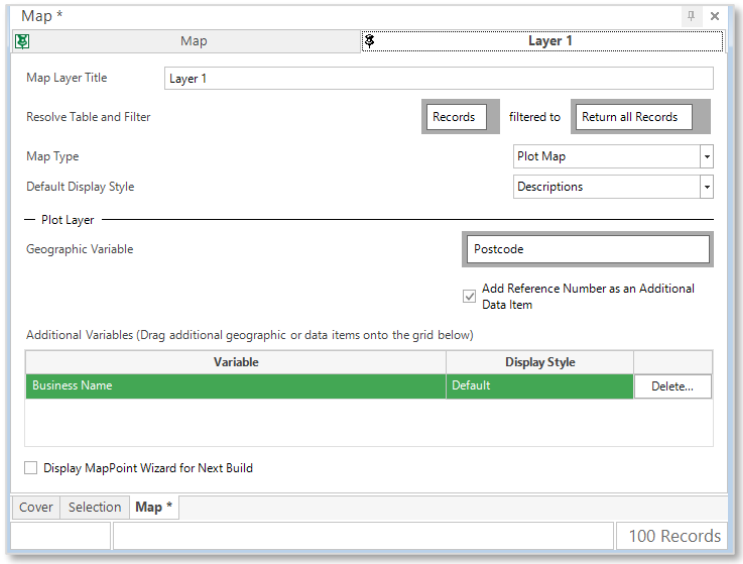
- Create a selection limited to 100 Records
- Drag the map icon onto your selection
- Click the **Layer 1** tab to apply the settings to your Map. Set **Map Type** to **Plot Map** and **Default Display Style** to **Descriptions**. Drag the **Postcode** variable onto the **Geographic Variable** box
- Drag the **Business Name** variable onto the **Additional Variables** area
- Click the **Build** button

You are now able to see where individual businesses are located by the pushpin symbols.

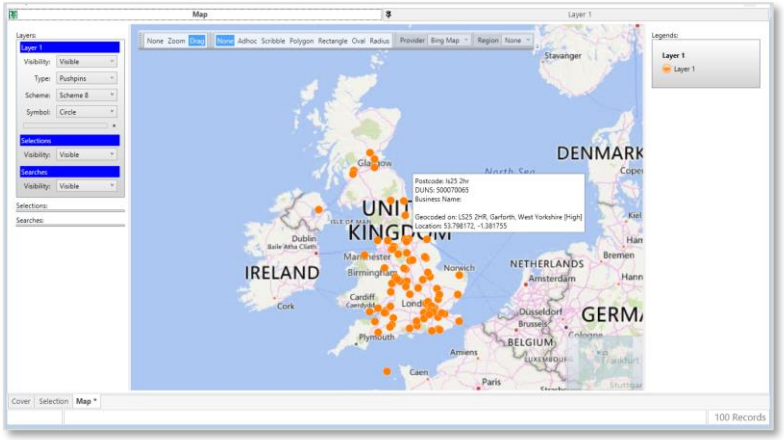
- Use the **Scribble** drawing tool to select an area. Right click within the area drawn and drag onto the workspace

You will now be presented with a selection window listing all of the DUNS numbers of Sites within that area.

- Right click on a pin and select **Show Information**. You will then be presented with an information box showing the **Business Name** and **DUNS** number



Settings for a Plot Map



Plot Terrain Map

Drive Time Mapping

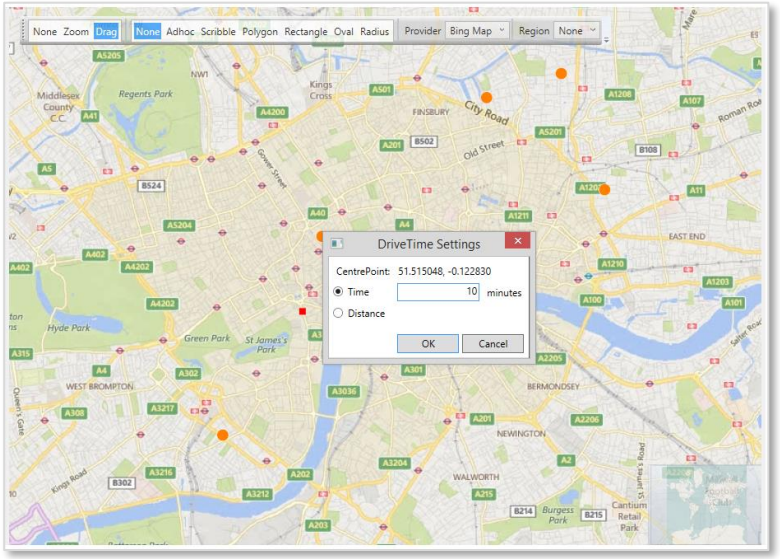
It is possible to use this function to find Sites that are within a determined area calculated upon the number of minutes it takes to drive from a given point.

- Using the **Plot Map** from the last example, create a drive time zone of 10 minutes from the centre of **London**
- Right Click on the Map and select **Search** type London
- Right click on the desired location in London and select **Create Drivetime Zone…**
- Set the **Drivetime** to 10 minutes and check the **Draw drivetime zone behind roads**
- Click **OK**

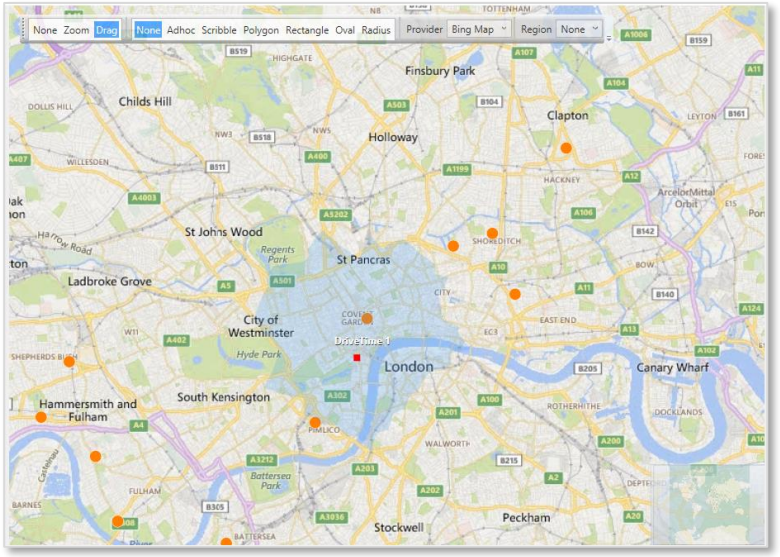
You can now find out how many Records on the Market Insight system are within this 10 minute drive time by:

- Right click within the selected area and drag onto the workspace
- Click on the **Build** button of the selection window that has been created

The result will be all the records shown on the map which can be reached within a 10 minute drive from the centre of London.



Create Drivetime Zone Window



Drivetime Zone Display

Reporting

Once you have used Market Insight to find relevant or interesting data from your system you will want to share this with others. One of the more formal ways is to produce a report of your results. Market Insight reporting option allows you to take you results and present them in a branded format.

- From the **Toolbox** drag the **Report** tool onto the workspace

The Report format is split into 3 areas – Header, Main Body (Detail) and Footer. You can use the Text Box & Drawing tools at the bottom of the window to top and tail your report and then save it as a Template. Use the Settings tab to further change the page layout.

- When you are happy with the layout of your Report select PDF or Word as the output format. Click on the **Build** button to see the Report in Adobe Reader or Word

- If you are happy with your creation rename as **Report Template**. Then drag and drop the icon onto the **Templates** ribbon bar

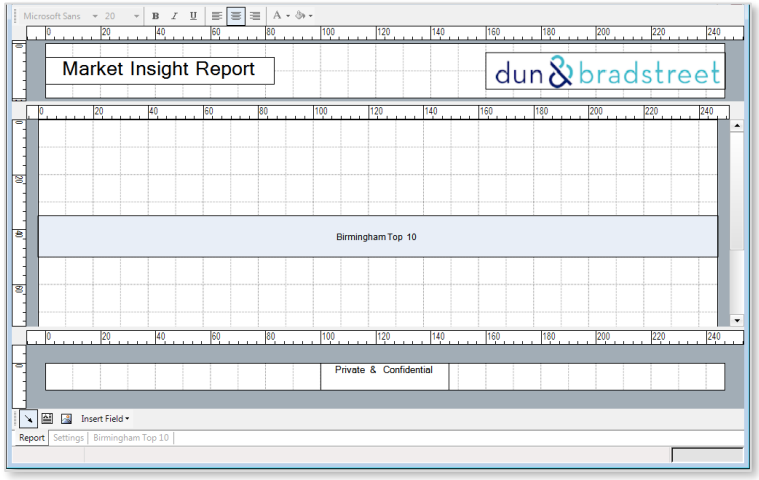
- Close the existing **Report Template**

- Drag the **Report Template** onto the workspace

- Drag and drop a tool object onto the centre part of your Report. In the example shown opposite a **Data Grid** has been dragged onto the main body of the Report

- Click on the **Build** button

The contents of the Data Grid now form the main body of the Report.



Report Setup Window

Report Displaying the Results of a Data Grid

Upload DUNS to Market Insight

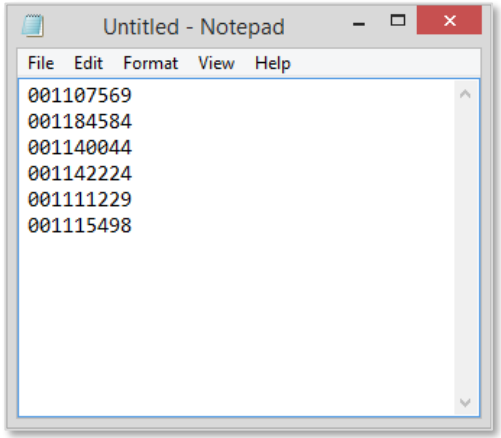
You can upload DUNS to Market Insight to allow you to analyse the identified records.

You can do this by:

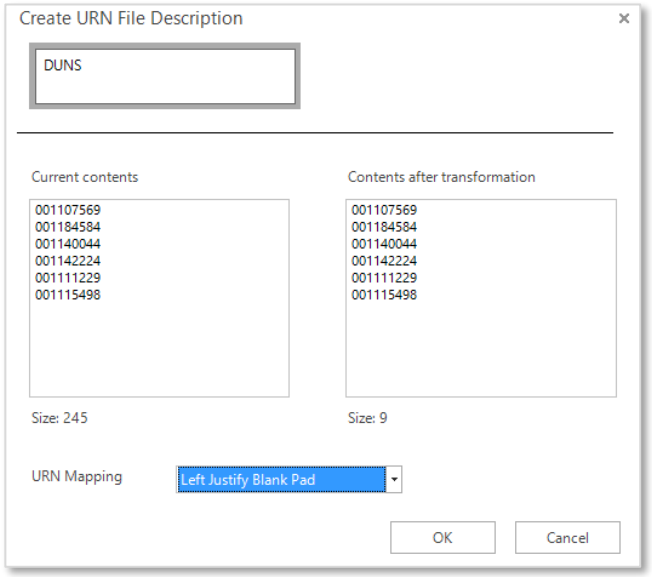
- Prepare a file with one **DUNS** number on each row
- Rename the file to have a **URN** (Unique Reference Number) extension
- Use the Market Insight **File Explorer** to Navigate to the file. It will be displayed with a red cross indicating that Market Insight does not yet have details about the file
- Right Click on the file and choose **Create URN File Description**
- Drag the **Duns Number** variable onto the drop on box
- Press **OK** to accept the default settings. The red cross will disappear
- Upload the URN file by dragging it from your computer to the private folder in **My MI V3 Folders**

You can select on the uploaded DUNS by simply dragging the file into a selection window in the same manner as you do for a selection variable.

N.B. Check that your DUNS number is 9 digits in length otherwise the system will not be able to find it.



URN File of DUNS



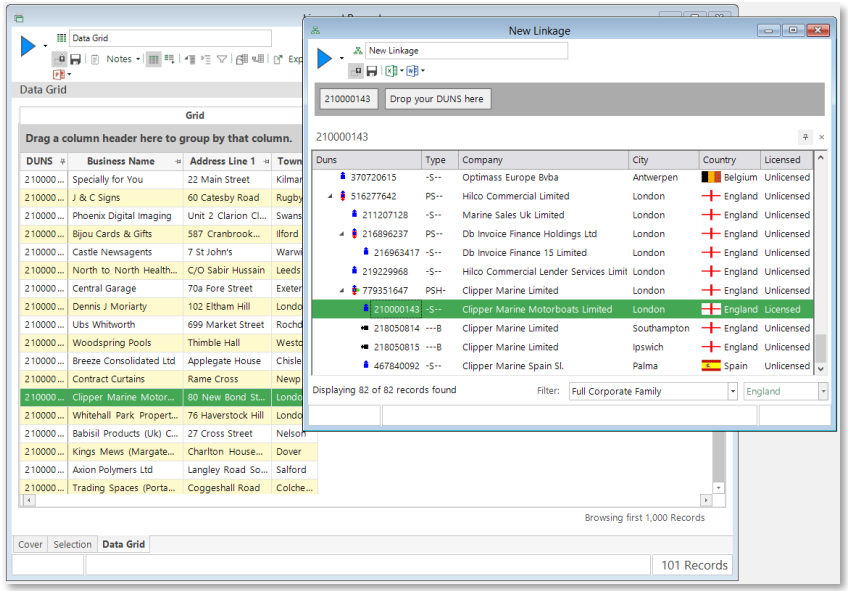
Create URN File Description Window

Linkage

Market Insight supports this optional module based on D&B's unique Who Owns Whom data about corporate ownership. This data set records ownership details so that relationships between different companies or specific sites within a corporate family can be established. A tree may be created from one or more DUNS numbers.

To create a Linkage Tree:

- Drag and drop a selection of licensed records onto the workspace
- Drag and drop a **Data Grid** onto the selection add relevant variables (ensure it includes the DUNS variable) and click **Build**
- Open a new **Linkage** tool by clicking on it in the toolbox ribbon bar. Notice that the Linkage tool does not apply to a selection (there is no selection tab at the bottom left). Linkage works on individual records rather than selected groups
- Arrange the two windows so you can see the central section of each
- Click to select one row in the data grid
- Drag the selected row and drop it onto the drop zone at the top of the **Linkage** window
- Click **Build** to create the Linkage tree



Linkage Tree Display of Associated Records

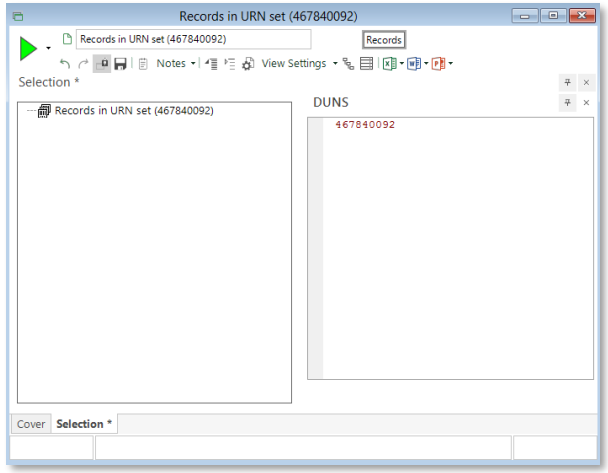
N.B. The display of the whole corporate structure with the Ultimate Parent company at the top. The business record selected is shown highlighted in position within the corporate ownership tree. Additional data is shown to the right hand side.

You can drag and drop a branch out of the Linkage Tree to create a selection expressed by DUNS numbers.

You can "hover" the mouse over the Linkage window when dragging a reference number. This will bring the Linkage window to the front to allow you to control where to drop the DUNS number.

You can run a number of trees concurrently by dragging several DUNS numbers into the drop zone area. The trees are displayed on tabs.

You can transfer the tree into Word, Excel or PowerPoint using the transfer buttons.



Branch Dragged from a Linkage Tree

Icon	Description
	Parent
	Headquarters
	Subsidiary
	Branch
	Parent & Headquarters
	Parent & Subsidiary
	Parent, Subsidiary & Headquarters
	Subsidiary & Headquarters

Linkage icons used to illustrate record relationships

Linkage Wizards

A wizard is also available to allow you to transform a series of DUNS numbers into a file of related DUNS numbers e.g. a set of records could be transformed into a file of DUNS numbers that relate to the Whole Group of records linked to that original set of records.

- From the **Wizards** tab click on the **Duns Transformation** wizard under the **Linkage Wizards** section

The first step of the wizard will appear which allows you to choose the transformation you want in terms of linking to other sites. A description is shown for the option you select.

- **Transformation Type** - Select **Whole Group** from the drop down list. Click **Next**

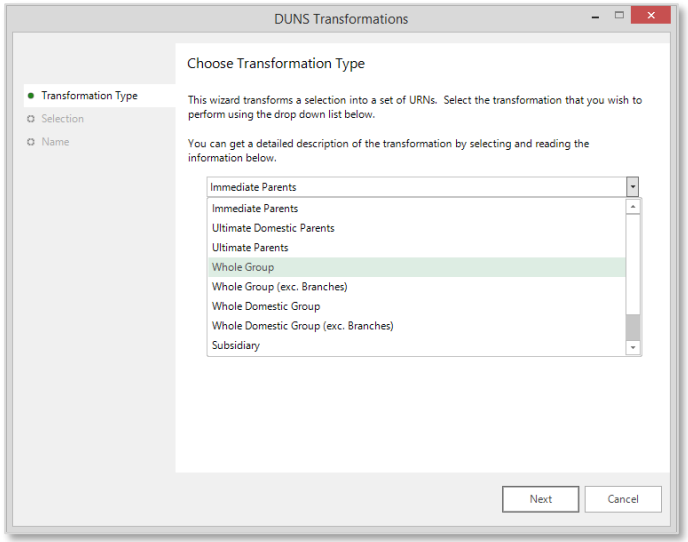
- **Selection** – Create a selection of records and drop it on the zone called **Drop your selection / Duns Number file here**. Click **Next**

The records associated with this selection will be used for the transformation.

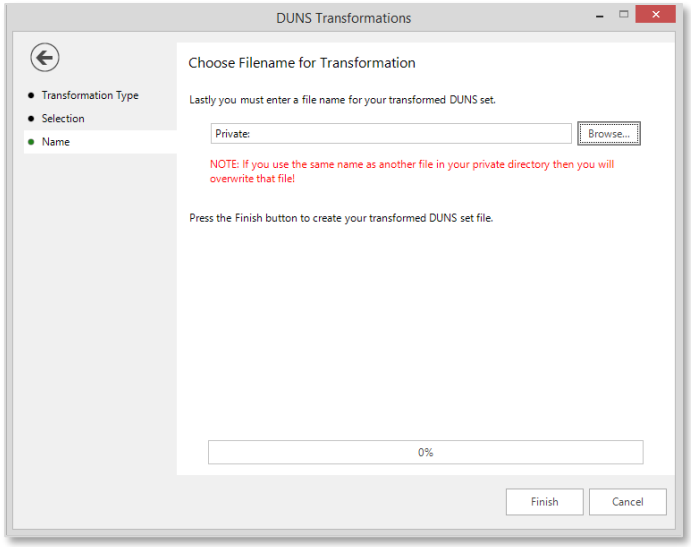
- **Name** - Click the **Browse…** button to navigate to your Private folder where the file will be created and give it a name

- Click **Finish** to generate the file

This example will create a file of DUNS numbers for all records that link to the original records in my selection.



Transformation Type



Name

Data Licensing

Data Licensing Wizard

Typically in a Market Insight system, some variables will not be visible to the user (through a browse or export) until they have been licensed. The Data Licensing wizard is used to license this data on demand. The wizard can be used to select what records are required and pricing is calculated based on pre-configured values.

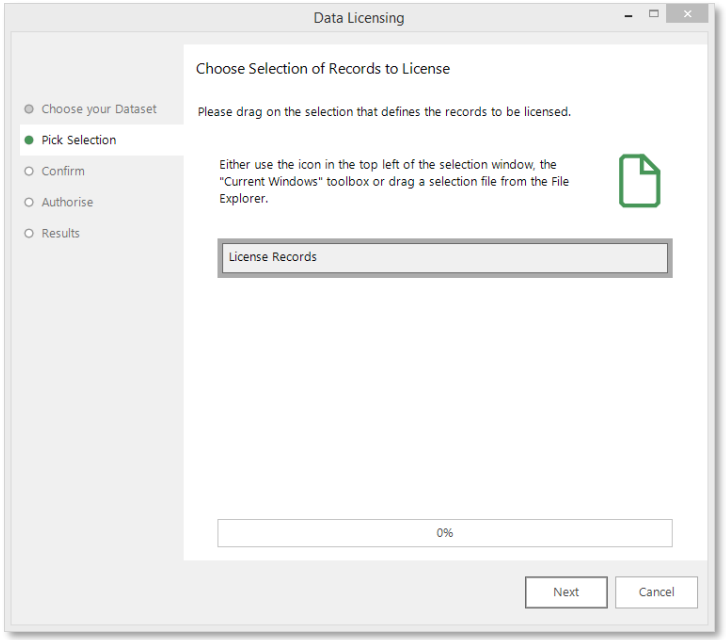
- From the **Wizards** tab click on the **Data Licensing** wizard under the **Purchase Wizards** section

N.B. Chose your Dataset is not shown in this wizard as currently only data is licensed at the Record table level.

- **Pick Selection** – Drag onto the drop zone on this step the selection that identifies the records you wish to license. Click **Next**

At this step you will see the number of records available to you to be licensed. Any records from the selection you already license will be automatically excluded from the figure.

To make a random sample of the records in your selection type the number in the box. A further figure will be displayed to show how many records are still available to license.



Pick Selection

- **Confirm** – Click **Next**

This step of the wizard shows the number of records in this transaction.

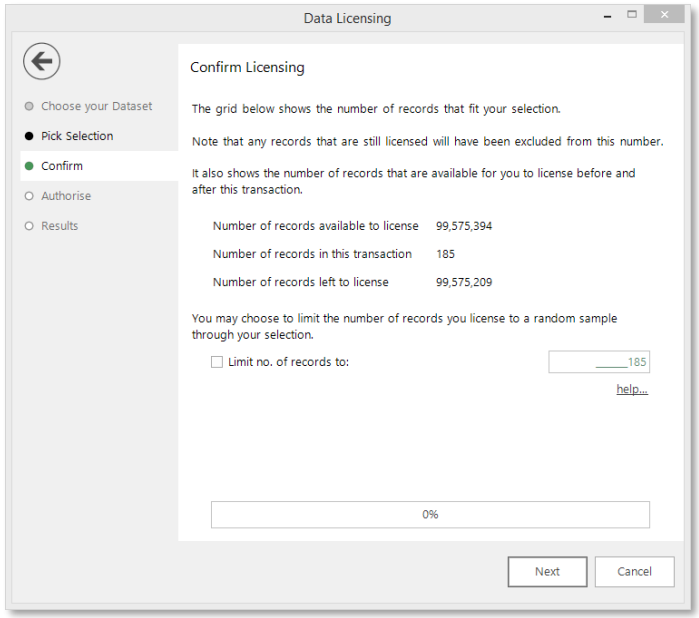
The purchase order number and job description are used for your own reference to identify an order after it has been made.

If you have been given a special "Authorisation Code" then you should tick the Use Authorisation code checkbox and enter it here.

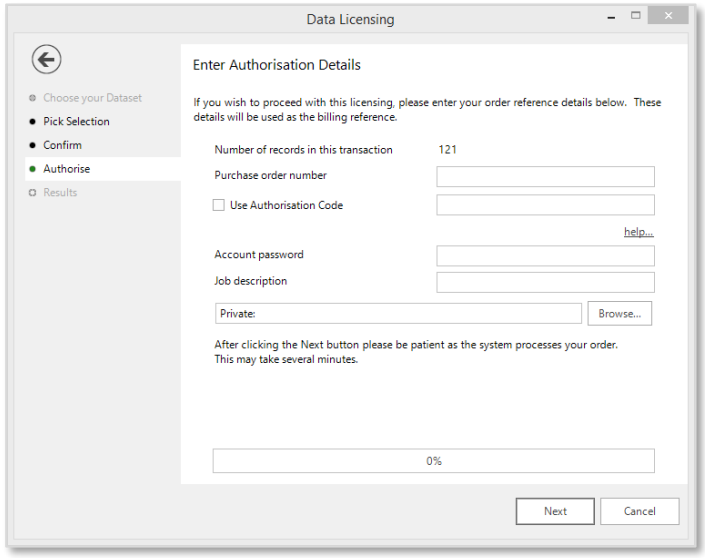
- **Authorise** – Enter the relevant information, including your **Account password** as security. Click **Finish**

- **Results** – This will show the results of the licensing transaction; the number of records licensed and the remaining number of records to be licensed. Click **Next** to close the wizard

Your licensed records from this transaction will be available as an URN file called and located as defined in the Authorise step. You can use a Data Grid to view these records or export them as shown in the next section of this manual.



Confirm

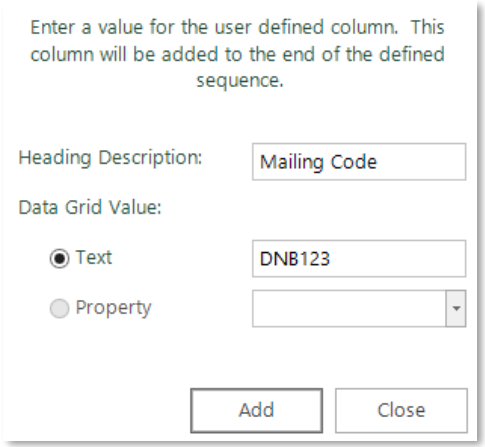


Authorise

Exporting Data

After using Market Insight to explore and analyse your data you will want to export relevant records for mailing etc. The method for completing this task is to use the Data Grid view of your selection.

- Create a selection of licensed records
- Drag and drop the **Name & Address** template onto the selection and click **Build**



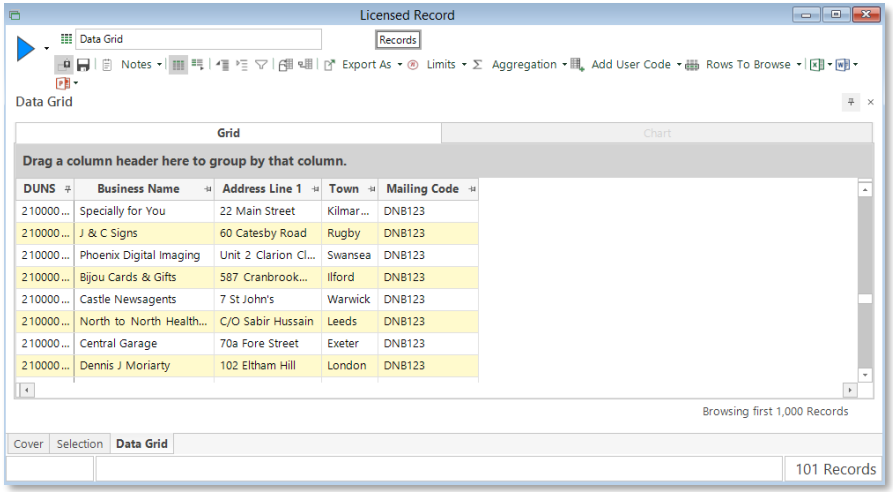
Add User Code Window

You may wish to add an extra column to your output at this stage to indicate a source/mailing code etc.

- Click on the **Add User Code** button and complete as opposite
- Click **Add**

A new column will now appeared on your Export Data Grid.

- Click on the **Build** button to see the new column populated



Export Data Grid with Mailing Code

You can amend the type of data file exported.

- Click on the **Export As** button

Here you can make the choices for your preferred Output Format.

Output Format – determines the type of file to export.

Header Row – if applicable for the file format selected, determines what headers are included at the top of the file;

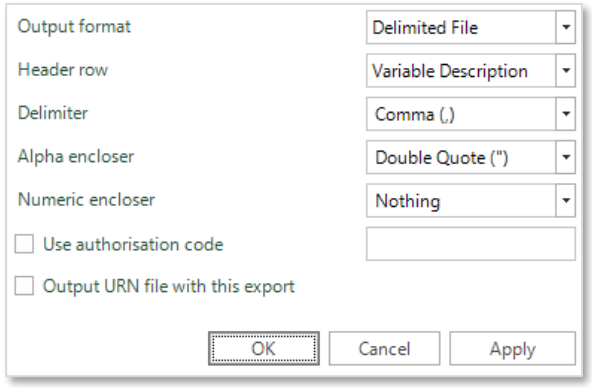
Delimiter / Alpha Encloser / Numeric Encloser – if applicable determine the characters used in the structure of a file. The popup menu offers a choice of typical and special characters, but you can type any normal character into the menu entry.

Use Authorization Code – this tick box and entry field is for use with D&B's Velocity Checking mechanism when the export exceeds the volume limits or is out of normal working hours.

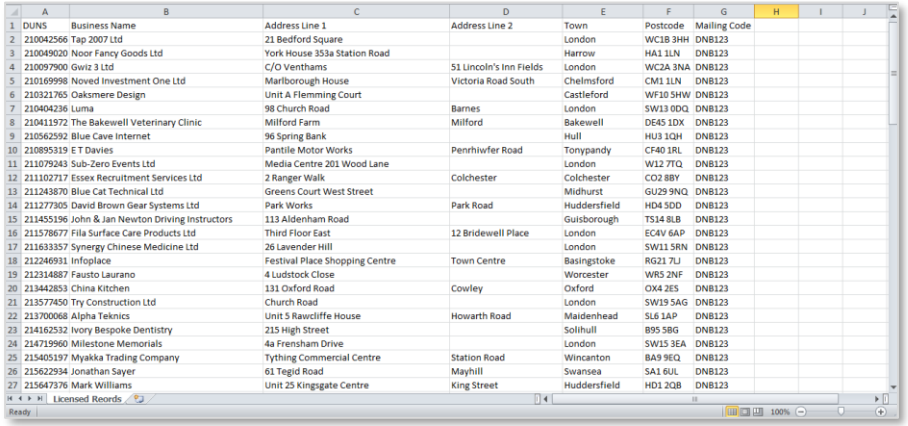
Output Reference file with this Output – determines whether the application will create a file of DUNS numbers in parallel with the data output.

- Leave the settings as they are and click **OK**. Rename the file **Licensed Records** and drag it onto the **Private** folder within the **File Window**

In this example you will see the file has a **.csv** extension. At this stage, the data file you have exported is on the Market Insight server. To transfer the file to your own PC, drag it from the private folder to any of your local PC's storage areas, for example to the **Desktop.** You will see the progress bar indicate the download process. Once downloaded, right click to email the file.



Export As Window



	A	B	C	D	E	F	G
1	DUNS	Business Name	Address Line 1	Address Line 2	Town	Postcode	Mailing Code
2	210042566	Tap 2007 Ltd	21 Bedford Square		London	WC1B 3HH	DNB123
3	210049020	Noor Fancy Goods Ltd	York House 353a Station Road		Harrow	HA1 1LN	DNB123
4	210097900	Gwiz 3 Ltd	C/O Venthams	51 Lincoln's Inn Fields	London	WC2A 3NA	DNB123
5	210169998	Noved Investment One Ltd	Marlborough House	Victoria Road South	Chelmsford	CM1 1LN	DNB123
6	210321765	Oaksmere Design	Unit A Flemming Court		Castleford	WF10 5HW	DNB123
7	210404236	Luma	98 Church Road	Barnes	London	SW13 0DQ	DNB123
8	210411972	The Bakewell Veterinary Clinic	Milford Farm	Milford	Bakewell	DE45 1DX	DNB123
9	210562592	Blue Cave Internet	96 Spring Bank		Hull	HU3 1QH	DNB123
10	210895319	E T Davies	Pantile Motor Works	Penrhiwfer Road	Tonypandy	CF40 1RL	DNB123
11	211079243	Sub-Zero Events Ltd	Media Centre 201 Wood Lane		London	W12 7TQ	DNB123
12	211102717	Essex Recruitment Services Ltd	2 Ranger Walk	Colchester	Colchester	CO2 8BY	DNB123
13	211243870	Blue Cat Technical Ltd	Greens Court West Street		Midhurst	GU29 9NQ	DNB123
14	211277305	David Brown Gear Systems Ltd	Park Works	Park Road	Huddersfield	HD4 5DD	DNB123
15	211455196	John & Jan Newton Driving Instructors	113 Aldenham Road		Guisborough	TS14 8LB	DNB123
16	211578677	Fila Surface Care Products Ltd	Third Floor East	12 Bridewell Place	London	EC4V 6AP	DNB123
17	211633357	Synergy Chinese Medicine Ltd	26 Lavender Hill		London	SW11 5RN	DNB123
18	212246931	Infoplace	Festival Place Shopping Centre	Town Centre	Basingstoke	RG21 7LJ	DNB123
19	212314887	Fausto Laurano	4 Ludstock Close		Worcester	WR5 2NF	DNB123
20	213442853	China Kitchen	131 Oxford Road	Cowley	Oxford	OX4 2ES	DNB123
21	213577450	Try Construction Ltd	Church Road		London	SW19 5AG	DNB123
22	213700068	Alpha Teknics	Unit 5 Rawcliffe House	Howarth Road	Maidenhead	SL6 1AP	DNB123
23	214162532	Ivory Bespoke Dentistry	215 High Street		Solihull	B95 5BG	DNB123
24	214719960	Milestone Memorials	4a Frensham Drive		London	SW15 3EA	DNB123
25	215405197	Myakka Trading Company	Tything Commercial Centre	Station Road	Wincanton	BA9 9EQ	DNB123
26	215622934	Jonathan Sayer	61 Tegid Road	Mayhill	Swansea	SA1 6UL	DNB123
27	215647376	Mark Williams	Unit 25 Kingsgate Centre	King Street	Huddersfield	HD1 2QB	DNB123

Example of a .CSV File Opened in Excel