insurity | SpatialKey | 101 Quick Start Guide

This Quick Start guide covers the basics of navigating through SpatialKey home screens, setting up new users & permissions, importing your first dataset, creating & sharing dashboards and more.
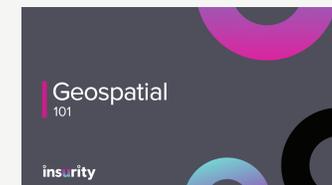
We value your feedback. Reach out to your account manager with questions or email support@spatialkey.com.

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SpatialKey 101
Watch this companion tutorial video to get a jump start on using SpatialKey.

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Home Interface

1. Tab Navigation

Use the tab navigation to quickly jump from Apps to Dashboards, Datasets and People (Admins only).

a) Apps

On the Apps tab, you can quickly launch apps or view your favorite dashboards.

b) Dashboards

View and manage saved dashboards across all applications. These could be dashboards you saved or those that have been shared with you.

c) Datasets

Import new datasets and manage existing ones. Find all data that you have imported or have been given access to.

d) People

User Admins can add new users, manage permissions of existing users and create groups. See next page for more on users & permissions.

2. Help

Click on the "?" icon to find support documentation and submit a support request. When you're inside an application, this menu also has a link to view a Quick Start guide specific to that app.

3. Notifications

You will receive notifications when processes complete, like when a dataset has finished importing.

4. Profile

Access your profile information, account quotas, API keys, and log out.
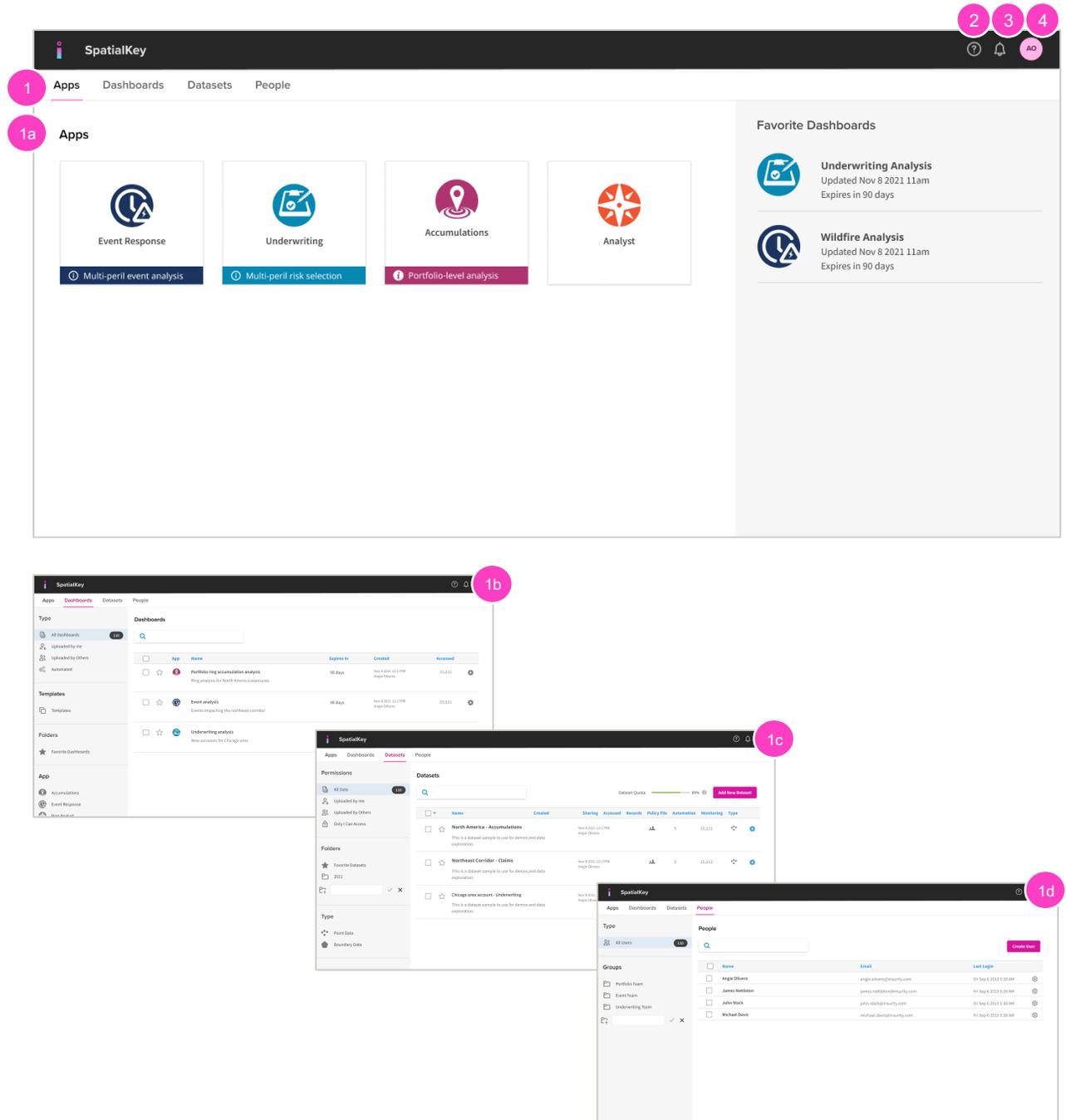
Users & Permissions

In the People tab, users with User Admin permission can create users & manage permissions. User permission levels described here refer to platform-level access. See p. 6 and 8 for more on data & dashboard permissions.

1. Creating a User

a) Select a permission level:

Viewer – A viewer can see dashboards and datasets that are provided by other users. They can also create & save dashboards.

Collaborator – A collaborator can do everything a viewer can do PLUS they can upload data and share data/dashboards with others.

User Admin – A User Admin can do everything a collaborator can do PLUS they can create & manage users.

Data Admin – A Data Admin can do everything a collaborator can do PLUS they have permission to take ownership of and delete any dataset in the system. They also have access to org API keys.

Super Admin – A Super Admin can do everything a User Admin and Data Admin can do. This should only be given to users you want to have system-wide admin access.

b) Enable or disable premium geocoding.

c) Enter name, email, and title.

2. Editing a User

Click on "settings" (gear icon) to edit a user. The same options as above are available for editing – name, email, title, and permissions.

3. Adding or Editing a Group

Click on the "new group" item in the left panel to add a new group. Click on "settings" (gear icon) next to the group name to edit or delete a group.

To add a user to a group, click the checkbox for the user, and use the blue banner to add that user to a group. To manager users in a group, click on the group folder, select a user from the group, and use the blue banner to remove them.
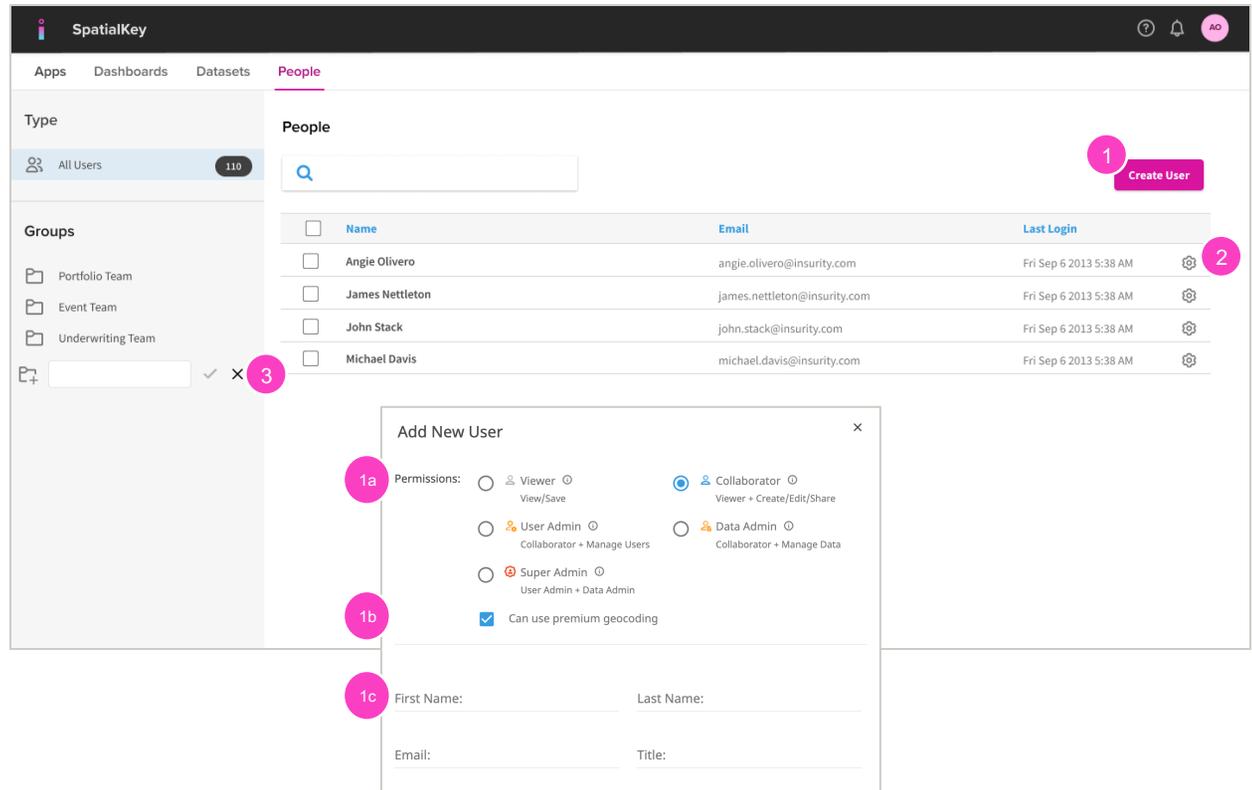
User Permission Levels					
User Permissions	Viewer	Collaborator	User Admin	Data Admin	Super Admin
View Datasets & Dashboards Created by or shared with them	✓	✓	✓	✓	✓
Create Dashboards	✓	✓	✓	✓	✓
Save Dashboards	✓	✓	✓	✓	✓
Upload Data	–	✓	✓	✓	✓
Share Dataset & Dashboards	–	✓	✓	✓	✓
Create & Manage Users	–	–	✓	–	✓
Take Ownership & Delete Data	–	–	–	✓	✓
Access to API Keys	–	–	–	✓	✓

Importing Data

First, you'll need to get your data into CSV format, no data model required. Once that's complete, you are ready to import your data into SpatialKey. There are several options:

1. Import Wizard

On the Datasets tab, click on the "Add New Dataset" button and select the "Upload Dataset" option.

Next, you'll be taken through a few steps to identify the information in your dataset like geography, location fields, geocoding options, column types, creating a title and setting up sharing options.

2. Import from Data Mart

The data mart is a small catalog of datasets available for you to import into your datasets list so you can interact with it in SpatialKey.

3. Underwriting Schedules

Underwriters can enter individual locations or import a schedule (CSV) directly in the Underwriting application. These datasets do not count against your quota.

In-force portfolios used within Underwriting for aggregation analysis or as a visual reference should be imported through the Data Upload Wizard or via API.


API import options

The **Data Import API** is a simple HTTP based interface that allows developers to programmatically import data into the SpatialKey environment.

No programming knowledge? You can leverage our API to create and update data in SpatialKey with the **Command Line Tool**.

Bridge ETL is a user-friendly app that sits on your desktop and does the work of converting and uploading RMS EDM or AIR's CEDE format for use in SpatialKey.

*Contact us for details to get up and running with APIs.*

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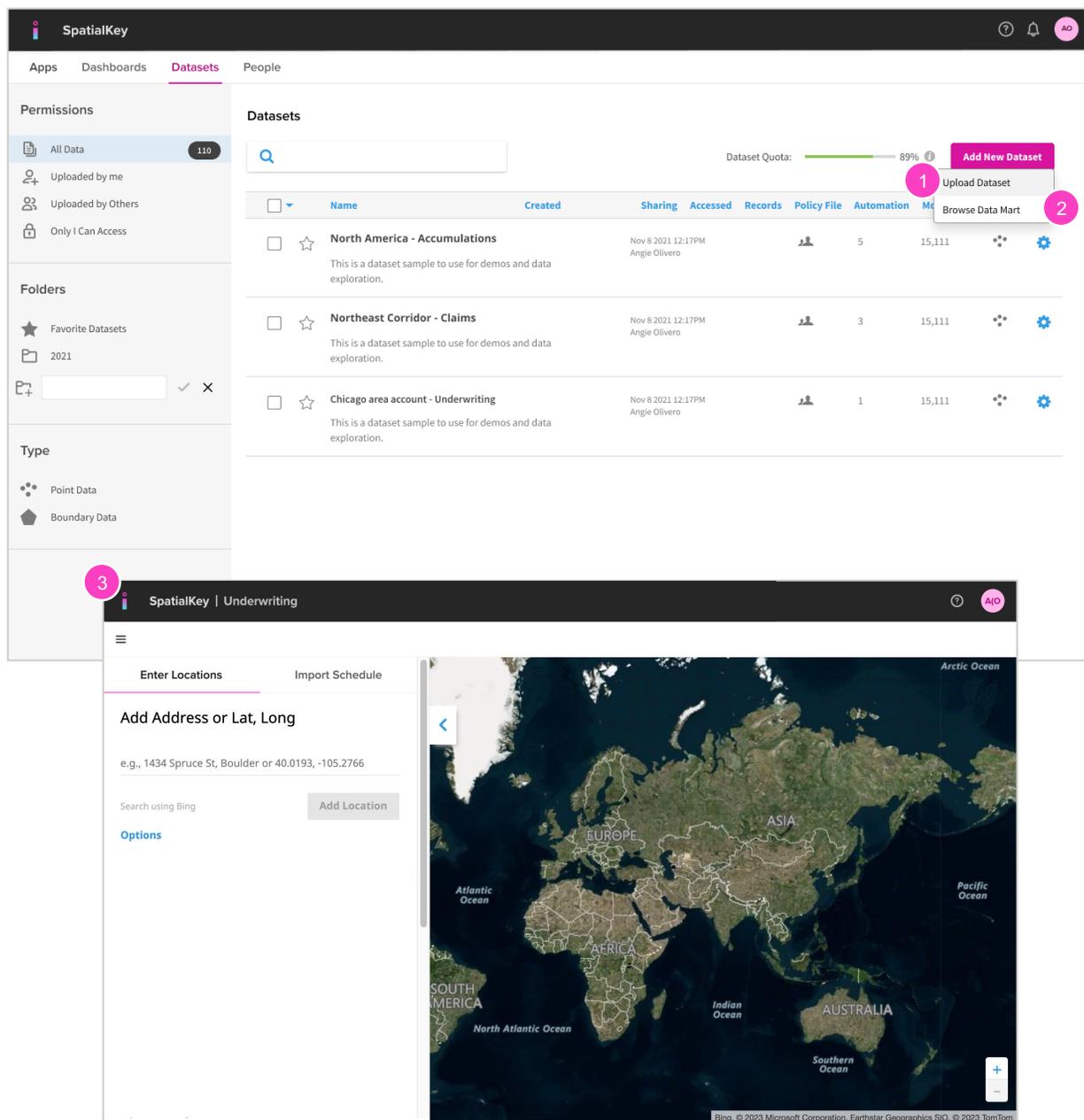
Importing Data (cont…)

In minutes, you can upload a data file and create and share interactive map-based analyses and reports. Even if you're new to SpatialKey, it's easy to start exploring the power of location intelligence.

Upload your own data or grab a sample file below:

1. **Sample insurance portfolio (download .csv file)**

   The sample insurance file contains 36,634 records in Florida for 2012 from a sample company that implemented an aggressive growth plan in 2012. There are total insured value (TIV) columns containing TIV from 2011 and 2012. The example shows counties viewed thematically with the top TIV labeled and top counties by year listed as unique values.
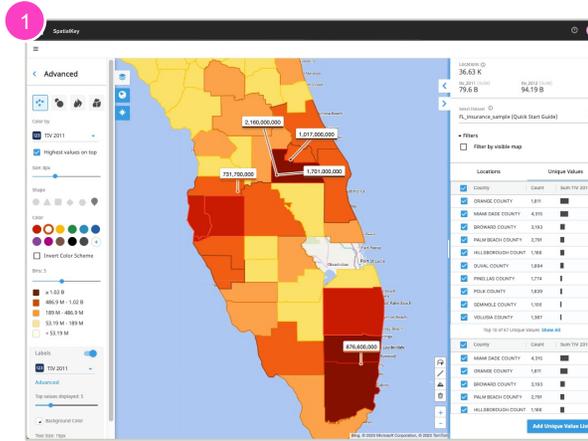
2. **Real estate transactions (download .csv file)**

   The Sacramento real estate transactions file is a list of 985 real estate transactions in the Sacramento area reported over a five-day period, as reported by the Sacramento Bee. The example shows a heatmap of location count with the average prices by each type of sale and ZIP code.
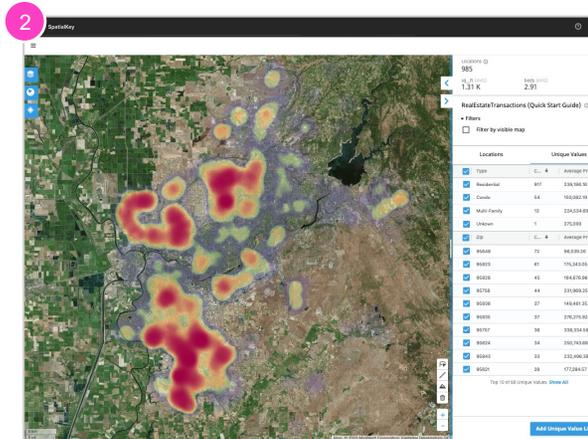
3. **Sales transactions (download .csv file)**

   The sales file contains 998 "sanitized" sales transactions during the month of January. These are easily summarized and filtered by product, payment type, country, city, and geography. The example shows the location count viewed as graduated circles with products and payment types listed by average price.
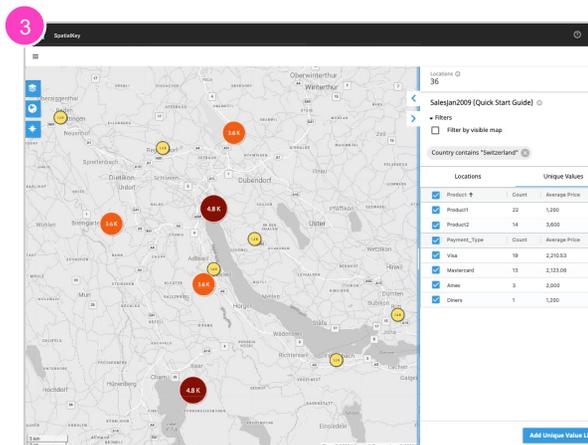
4. **Company Funding Records (download .csv file)**

   The TechCrunch Continental USA file is a listing of 1,460 company funding records reported by TechCrunch. As part of the import process, geocode these records using the city and state information in the file. Try adding another map layer with the Layers manager so you can visualize both a heatmap and points with the same dataset.
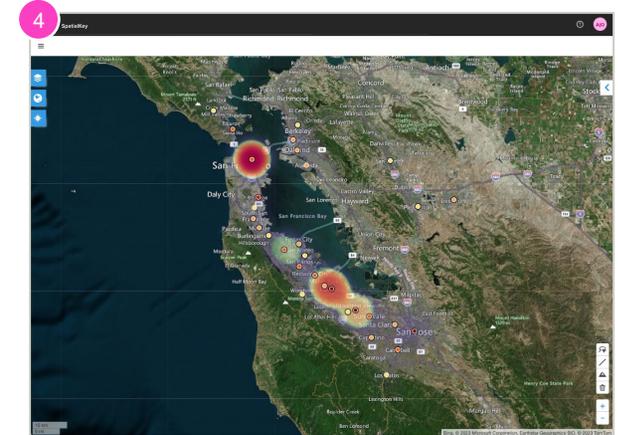
5. **Crime Records (download .csv file)**

   The Sacramento crime January 2006 file contains 7,584 crime records, as made available by the Sacramento Police Department. Law enforcement agencies should enjoy working with this dataset.

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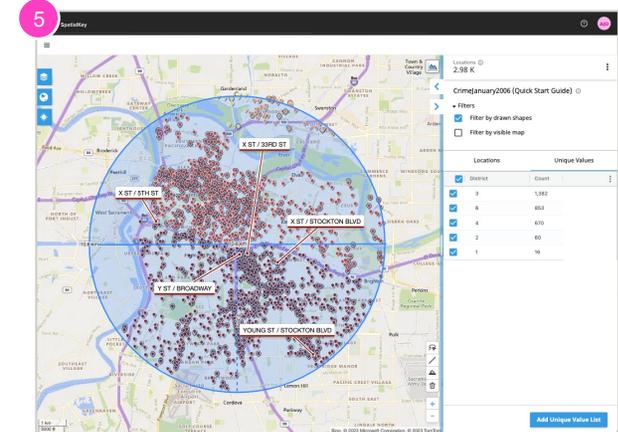
Dataset Sharing & Permissions

Sharing data with others in your organization has never been easier.

1. Select the Datasets tab and find your dataset. Click on the gear icon to view data settings and select the "**Share with Users**" option in the left navigation.

2. Click the "**Add User**" button to get a full list of users that can be added.

3. Once the users are added to the dataset, you can manage their **permissions levels**.

   You can give individual users or groups permission to datasets – either Viewer, Contributor or Editor. Users who imported the data are set as Creators.

   • **Viewers** can do just that… view the data. They cannot take any action that would impact that data. They can only view it as-is.

   • **Contributors** have all Viewer permissions plus the following:

     • Option to "allow viewers to export as CSV"

     • Edit title & description

     • Share & export data

     • Edit column labels

     • Join data

     • Manage permissions for Viewers & Contributors

   • **Creator/Editors** have the same permission level, there's just the added distinction on who created the dataset. Creators and Editors have all Contributor permissions plus the following:

     • Set up automation

     • Join policy files

     • Append, replace & delete

     • Manage permissions for all users

If the option for "Allow viewers to export as CSV" is disabled, viewers will not be able to export a dataset. Note that they will still be able to view dashboards, capture screenshots and export analytic pods, except for the record list.
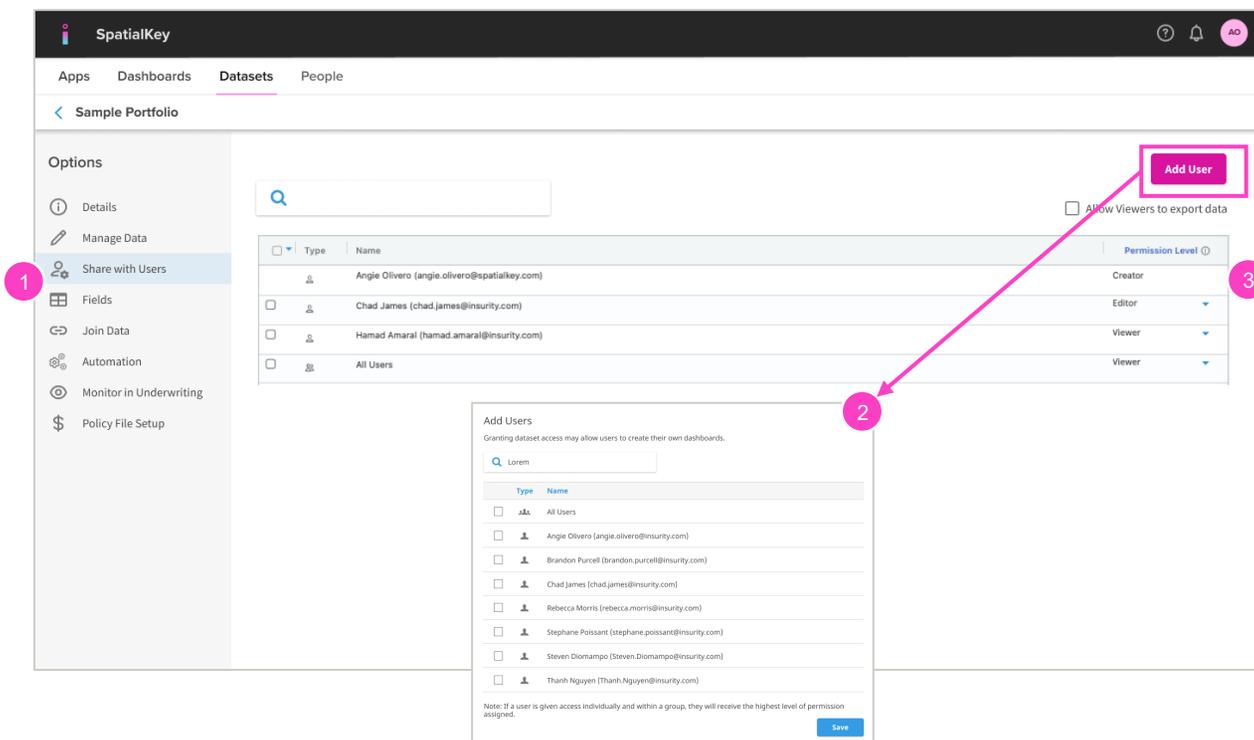
Dataset Permission Levels			
Dataset Permissions	Viewer	Contributor	Editor
Edit Title / Description	Read-only	✓	✓
Share with Users	–	✓	✓
Export	If enabled*	✓	✓
Edit Column Labels	–	✓	✓
Join Data	Read-only	✓	✓
Set up Automation	Read-only	–	✓
Policy File Setup	Read-only	–	✓
Append & Replace	–	–	✓
Delete	–	–	✓

Dashboard Overview

Your data has been uploaded, now it is time to build your first dashboard. Open Analyst from the Apps tab, select a dataset and voilà, you've got a dashboard.

There are lots of ways to slice, dice and investigate your data. Let's dig deeper into dashboard functionality:

1. **Layers:** Control display of datasets, opacity, and click to view advanced visualization options.

2. **Map Layer:** Control the base map and types like hybrid, street or black & white views.

3. **Legend:** Interpret how each layer is visualized.

4. **Statistics Pod:** By default, you'll see the location count and sum TIV in the stats pod. Click the Charts icon in the right panel to add additional stats to your dashboard.

5. **Filters:** Applied filters will display as chips or checkboxes.

6. **Locations:** A list of all records in your data will display here along with the ability to filter at the top of each column.

7. **Policies:** If you have a policy file joined to your locations data, a list of all policies will show here along with the ability to filter at the top of each column.

8. **Unique Values:** Create a list of unique values to aggregate and filter your data by values like TIV or count of records.

9. **Map Tools:** Measure distance, elevation and use drawing tools to filter your data.

TIP!

A. Use the hamburger menu to create new, save, save as, or close a dashboard.

B. Click the Filter or Chart icons to expand or collapse the view. Drag the blue vertical bar to resize the right panel and get a better view.

C. Use your mouse to drag & pan the map. Use your mouse wheel or the "+" & "-" buttons to zoom.

Save & Share Dashboards

Easily collaborate and share dashboards across your organization to ensure seamless communication.

Save in Analyst

1. "Save Dashboard" will save the existing dashboard and overwrite anything that was previously saved.

2. "Save As" allows you to save a new dashboard without overwriting previously saved work.

Note: dashboards in Accumulations, Event Response and Underwriting are **automatically saved** when the analysis is first run.

- Event Response dashboards expire after 90 days.
- Underwriting single lookups expire after 5 days and schedules expire after 90 days.

Share

3. Access your dashboards via the "Dashboards" tab in the home interface. Click the settings icon to get to Dashboard Sharing.

4. A dashboard owner can share it with other SpatialKey users by clicking "Add Owner" in dashboard settings.

   Adding an owner allows you to select specific users or groups and give them access to your dashboard and your underlying data all in one step. Anyone who didn't already have access to the underlying data will be given Viewer permissions on the data.

   Shared dashboards will show for those users in the Dashboard tab.