

insurity SpatialKey | Analyst Quick Start Guide

This Quick Start guide covers the basics of our flagship Analyst application. Analyst is a multipurpose geospatial application that isn't limited to a particular workflow. Just open a dataset and start inspecting your data visually. Analyst's features are the foundation for our purpose-built applications like Underwriting, Event Response, and Accumulations.

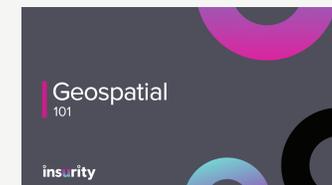
We value your feedback. Reach out to your account manager with questions or email support@spatialkey.com.

Contents

Dashboard Overview	2
Basic features across all dashboards including data manager, layer manager, visualization options, filters and more.	
Layers, Base Map & Legend	3
A deeper dive into visualization options, pin shapes, colors, bins, labels and more.	
Labels	4
Add labels to top values in your data and customize the placement, color, size, etc.	
Analysis Tools	5-6
Summarize your data with statistics, filter by unique values, measure distance or elevation and more.	
Filtering Data	7
Filter by data attributes, the visible map area or custom drawn shapes.	
Save & Share Dashboards	8
Collaborate and share with others across your organization.	

SpatialKey 101

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



More Quick Start Guides

[SpatialKey 101](#) | [Analyst](#) | [Accumulations](#) | [Event Response](#) | [Underwriting](#) | [APIs](#)

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:

- Layers:** Control display of datasets, opacity, and click to view advanced visualization options.
- Map Layer:** Control the base map and types like hybrid, street or black & white views.
- Legend:** Interpret how each layer is visualized.
- 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.
- Filters:** Applied filters will display as chips or checkboxes.
- Locations:** A list of all records in your data will display here along with the ability to filter at the top of each column.
- 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.
- Unique Values:** Create a list of unique values to aggregate and filter your data by values like TIV or count of records.
- Map Tools:** Measure distance, elevation and use drawing tools to filter your data.

The screenshot shows the SpatialKey Analyst interface with a map of the United States and Mexico. A stats pod on the left shows 10 locations and a TIV sum of \$10.18 M. A 'Unique Values' table is overlaid on the map, listing cities and their TIV sums. On the right, a 'Data & Filters' panel shows a list of 10 location records with columns for City, ZIP/Postal Code, and Occupancy. Below the map, there are three panels: 'Layers' (with 'Schedule Quick Start Guide' selected), 'Map Layer' (with 'Basemap' selected), and 'Legend' (showing color-coded ranges for 'Schedule Quick Start Guide' and 'Portfolio Quick Start'). At the bottom right, a 'Charts' panel shows 'Add Charts' options for 'Stats' and 'Unique Values'.



TIP!

- Use the hamburger menu to create new, save, save as, or close a dashboard.
- 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.
- Use your mouse to drag & pan the map. Use your mouse wheel or the "+" & "-" buttons to zoom.

Layers, Base Map & Legend

Use the **layers** to adjust the visualization of your data. Toggle the layers on/off or adjust the opacity of layers to make different elements stand out on your map.

1. Use the **Advanced** options to adjust the visualization of any point dataset in your dashboard.
 - a. **Visualization Options:** Point datasets will have 4 display options: individual points, graduated circles, heatmap, and thematic.
 - b. **Color By:** Color your data by any column on your dataset e.g., TIV or City. When visualizing by graduated circles, heatmap, or thematic, only aggregate numeric values will apply.
 - c. **Size:** Adjust how large points render.
 - d. **Shape:** Select from 6 different shapes when viewing your data as individual points.
 - e. **Color:** Select from various preset color family options or create your own with the "+" icon.
 - f. **Bins:** Select from between 2 to 9 bins to color and group your data.
2. Enable the **elevation layer** to view global contours.

Adjust the **base map** visualization from satellite to street view. If you have more than one base map enabled, you could switch between them here.

The **legend** helps you make sense of all the data that is being visualized.

The screenshot displays the SpatialKey Analyst interface. On the left, the 'Layers' panel shows two layers: 'Colored by Locationtiv' and 'Elevation Layer'. The 'Advanced' configuration panel is open for the 'Colored by Locationtiv' layer. It features several sections:

- Visualization Options:** Four icons representing different point styles: individual points, graduated circles, heatmap, and thematic. Callout 1a points to these icons.
- Color by:** A dropdown menu set to 'Locationtiv'. Callout 1b points to this dropdown.
- Size:** A slider set to '6px'. Callout 1c points to the size value.
- Shape:** Six shape icons: circle, square, triangle, diamond, hexagon, and pentagon. Callout 1d points to the circle shape.
- Color:** A color palette with various colors and a '+' icon for custom colors. Callout 1e points to the color palette.
- Invert Color Scheme:** A checkbox that is currently unchecked.
- Bins:** A slider set to '3' bins. Callout 1f points to the bin count.
- Legend:** A legend showing three color-coded bins:
 - Red: ≥ 64.26 K
 - Orange: 30.26 K - 64.26 K
 - Yellow: < 30.26 K

Callout 2 points to the 'Elevation Layer' toggle in the Layers panel.

Labels

Add custom labels to any point dataset in your dashboard. By default, the first column on your data will be used to label the top 10 values.

Click the “Advanced” link in the layer panel to find the toggle for labels along with other visualization options.

1. **Select a column** (numeric or text) to quickly add top labels to your dataset.
2. Use the **Advanced option** to create your own formula to fully customize the labels.
3. Label up to **20 top values**.
4. Change the **background color** to help the labels stand out on the map. Labels default to a white background.
5. Adjust the **text size** between 1-30px. Text size defaults to 15px.

TIP! Drag labels around to position them to your liking. Double-click a label to customize each one individually. Deleting the text within a label will return it to its default state.

TIP! Select “Filter by visible map” if you'd like to narrow what is labeled to only locations you can see on your screen (vs. top values across the dataset).

The screenshot shows the SpatialKey Analyst interface. On the left, the 'Advanced' layer panel is open, showing configuration options for labels. A pink arrow points from the 'Advanced' link in the layer panel to the 'Advanced Labels' dialog box. The dialog box is titled 'Advanced Labels' and contains a text input field with the formula 'TIV: \${locationtiv}'. Below this, there is a 'Search columns...' field and a list of columns with 'Add +' buttons: Locid, Siteid, Accgrpid, Streetname, Postalcode, and City. A small map preview in the dialog shows a label 'TIV: \$67,428' on a map. The main map shows several orange and red points with labels like 'TIV = \$16,606,115.32', 'TIV = \$458,020', and 'TIV = \$1,259,521.65'. A pink circle with the number '2' is next to the 'Advanced Labels' dialog box.

Analysis Tools

Enhance your analysis with these reporting tools:

1. Statistics Panel

By default, you'll see a Stats pod in your dashboard with total location count and the sum of the metric selected for the analysis or TIV (if available).

You can add additional statistics to your dashboard by clicking the more menu icon in a stats pod or by clicking the "Stats" button under "Add Charts" in the right panel. Select from any numeric value in your dataset and aggregate by Sum, Avg, Min or Max.

The Stats pod will appear, and you can drag it anywhere on your map.

2. Unique Value Lists

Next to the Stats button in the Charts panel, you'll find the Unique Value List (UVL) button.

Click the button and then select any column from your location or policy file and the metric you want to aggregate.

The UVL will pop up with your unique values and aggregates. You can drag the pod anywhere on your map and use the rows to filter your data.

The screenshot shows the SpatialKey Analyst interface. At the top, it says "Sample Dashboard". On the left, there's a "Stats" pod (1) showing "Locations: 10 K" and "Locationtiv (SUM): 453.65...". Below it is a "Unique Values" table (2) with columns for City, Count, and Sum Location... The table lists cities like ATLANTA, COLUMBUS, DALLAS, etc. On the right, there's a "Charts" panel with "Add Charts" and "Edit Charts" buttons. A "2a" callout points to the "Add Unique Value List" modal window, which has fields for "Sample Portfolio", "Select a column...", and "Show Aggregate as:" (Values, % Percent, Chart). A "1a" callout points to the "Add Statistic" modal window, which has similar fields for "Sample Portfolio", "Select a column...", and "Sum".

City	Count	Sum Location...
ATLANTA	613	30,378,867.14
COLUMBUS	458	27,797,202.53
DALLAS	377	24,224,474....
AURORA	781	22,571,858....
DENVER	564	22,164,328.01
CHICAGO	483	20,962,600....
PHOENIX	638	18,569,264....
DETROIT	277	17,798,884.5
KANSAS CITY	359	10,861,868....
FORT WORTH	131	8,417,522.99

Analysis Tools (continued)

Enhance your analysis with these analytic tools:

1. Distance Tool

The distance tool allows you to measure the distance between any points on the map. You can add as many vertices to your ruler as you wish.

2. Elevation Profile

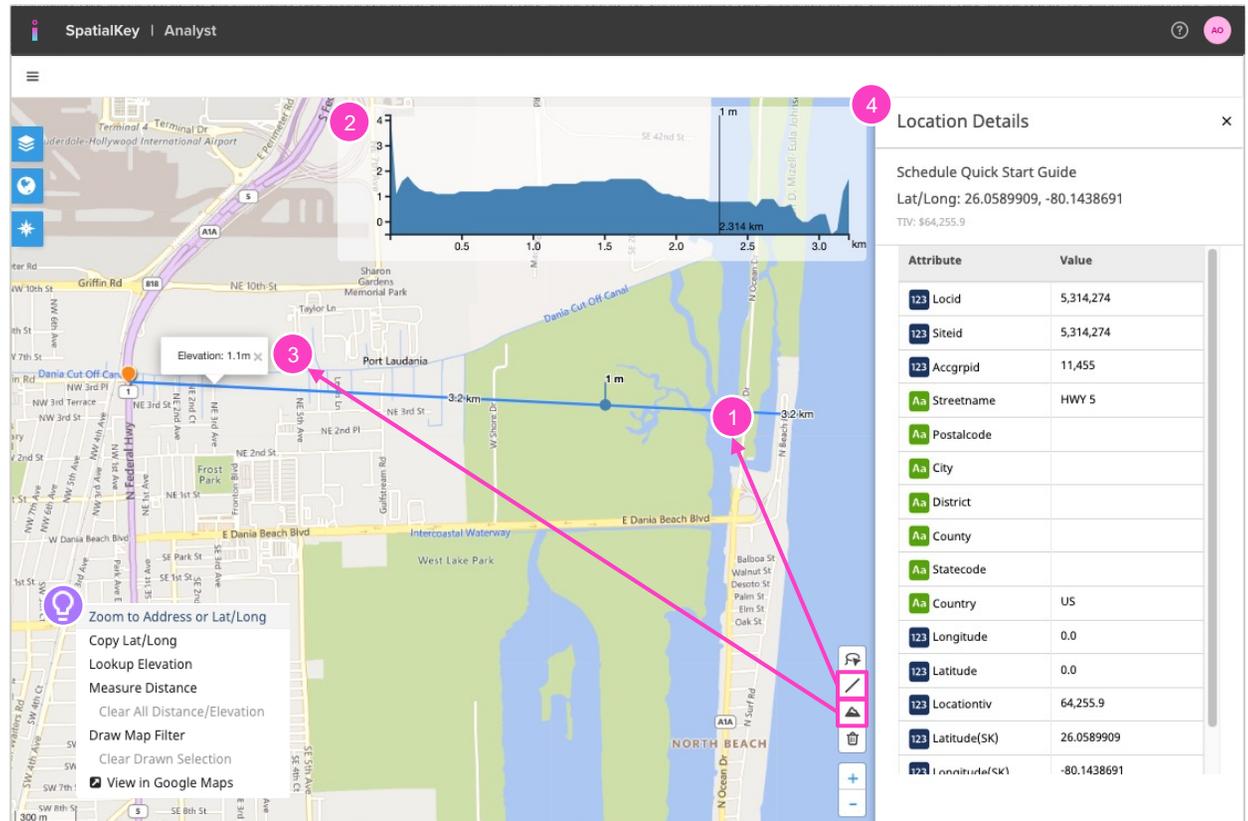
To visualize the elevation across the ruler that you drew with the distance tool, hover over the line to view the elevation profile.

3. Elevation Tool

Use the elevation tool to look up the elevation for any single point on the map.

4. Location Details

Hover and click a location to see all the details of that location.



TIP! The distance tool and elevation tool can also be accessed by right clicking anywhere on the map.

Additional tools accessible in the right click menu:

- Zoom to Address or Lat/Long
- Copy Lat/Long
- View in Google Maps

Filtering Data

There are many ways to filter your data to narrow your analysis:

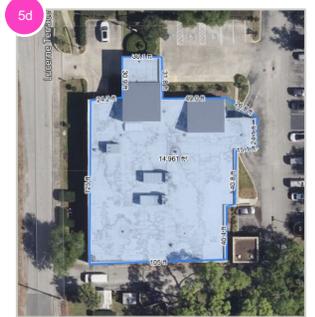
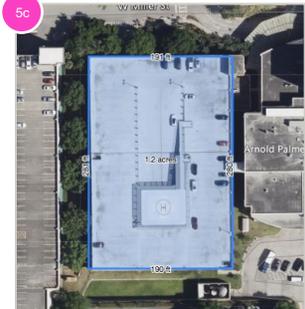
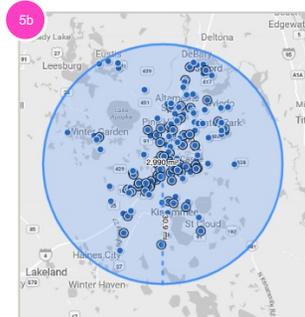
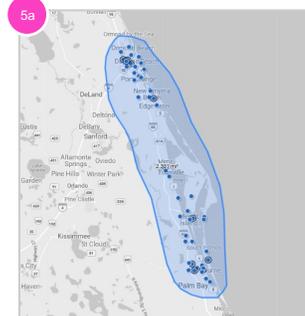
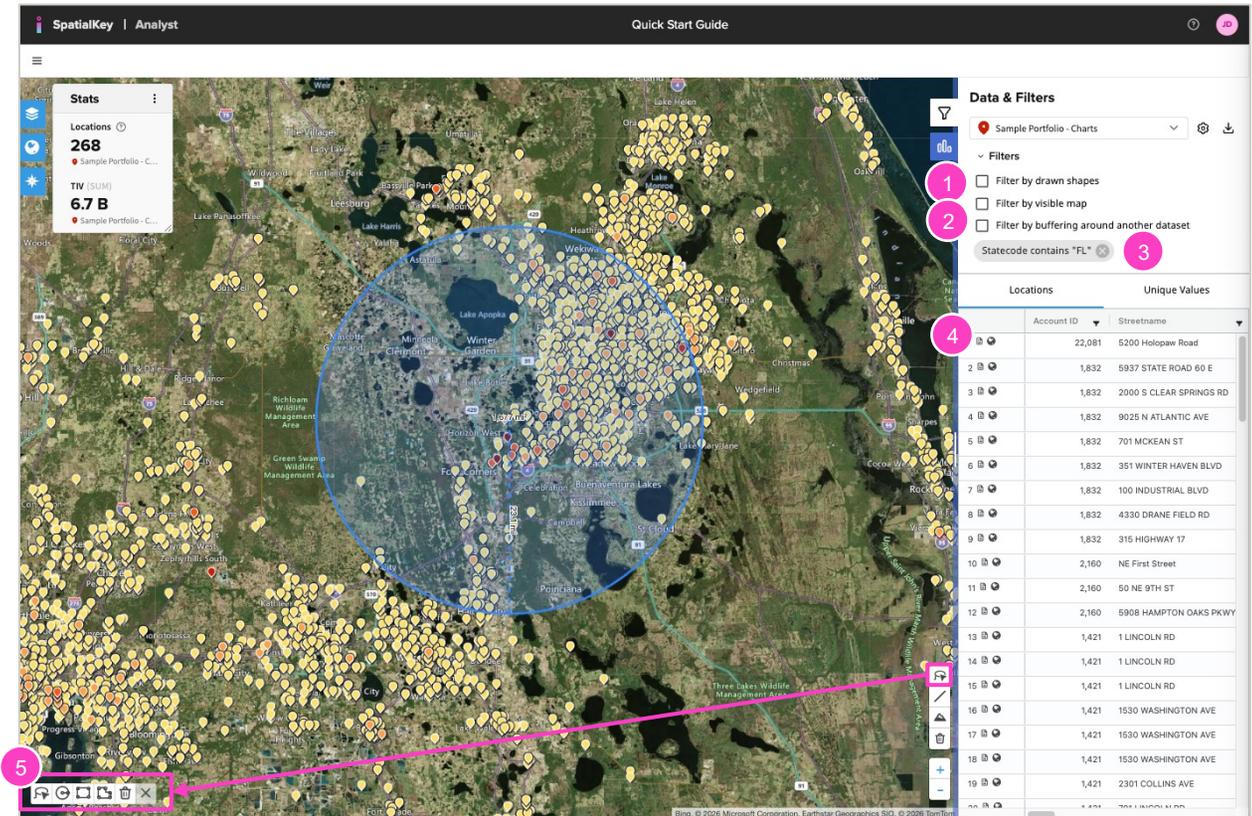
- Filter by Drawn Shapes:** When drawing custom shapes, this checkbox allows you to easily toggle to filter by the shape or not.
- Filter by Visible Map:** You can select to filter by visible map which will limit the locations in the List Report to only those visible on the map. This is helpful in keeping the List Report in sync with what you are currently visualizing.
- Filter Chips:** Filters applied from data columns will display as chips that can be removed here.
- Column Filters:** Use the column filters from your location or policy file (if available) in the List Report to narrow down your locations. Apply filters across multiple columns and then set the filter to require **ALL** or **ANY** of the criteria to be met (e.g. "and" vs. "or").
- Custom Shapes:** Draw custom shapes to filter your data, show the square feet or miles and, where relevant, radius, distance, and perimeter.

Click individual shapes to **edit**, **drag** them to a new position, or hit the **delete** key to remove them.

Use the **trash can** to **clear all** drawn shapes at once.

Drawing filters have 4 different options:

- Use the **freehand lasso** tool to draw a custom shape around locations to filter your data.
- Draw a **circle** to see how many locations fall within a certain radius.
- The **rectangle** tool can help you quickly calculate a perimeter.
- Use the **polygon** tool for irregular perimeters or to estimate square footage.



Save & Share Dashboards

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

Save

1. "Save As" allows you to save a new dashboard without overwriting previously saved work.
2. "Save Dashboard" will save the existing dashboard and overwrite anything that was previously saved.

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.

The screenshot illustrates the SpatialKey Analyst interface with four numbered callouts:

- 1:** A dropdown menu is open, showing options: "New Dashboard", "Save As...", "Save Dashboard", and "Close App".
- 2:** A pink circle highlights the "Save Dashboard" option in the dropdown menu.
- 3:** A pink circle highlights the settings gear icon in the "Dashboards" list table.
- 4:** A pink circle highlights the "Add Owner" button in the "Dashboard Sharing" settings panel.

The "Dashboards" table in the middle screenshot shows the following data:

App	Name	Expires In	Created	Accessed
<input type="checkbox"/>	Portfolio ring accumulation analysis Ring analysis for North America exposures	90 days	Nov 8 2021 12:17PM Angie Olivero	15,111
<input type="checkbox"/>	Analyst Quick Start Guide	Never	Nov 8 2021 12:17PM Angie Olivero	15,111
<input type="checkbox"/>	Underwriting analysis New accounts for Chicago area	90 days	Nov 8 2021 12:17PM Angie Olivero	15,111

The "Dashboard Sharing" panel shows the following datasets and users:

Datasets included in this dashboard	
Name	
Angie Sample Portfolio Pel-1mil Locs - fresh	Edit permissions
Sample Schedule Quick Start Guide	Edit permissions

Who can see this dashboard		Permission Level
Type	Name	
👤	Angie Olivero (angie.olivero@insurity.com)	Creator