Profile Worksheet Report

OVERVIEW

This document will take you through the process of creating a Profile Worksheet report.

The Profile Worksheet report shows usage information, by segment, for products and services.

LOCATE PROFILE WORKSHEET REPORT

1. From the homepage, click on Reports.

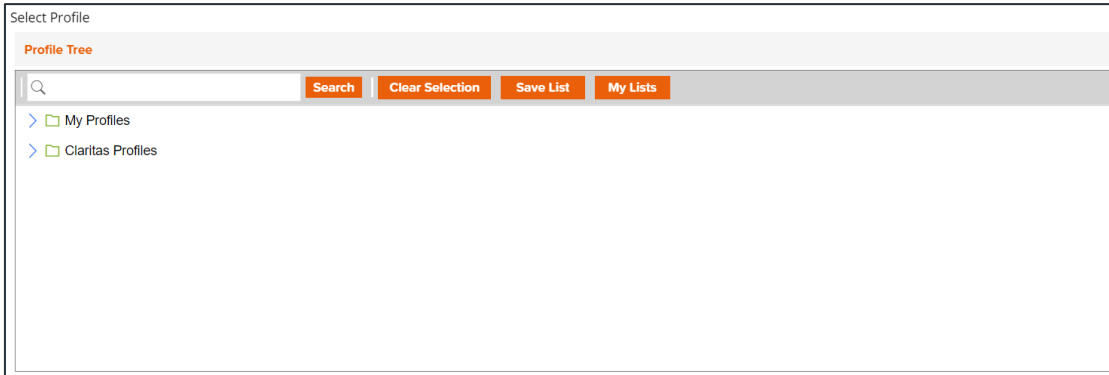2. Select Segmentation Reports ➝ Profiler Reports ➝ Profile Worksheet.

SELECT REPORT INPUTS

Select Segmentation System & Profile

1. Select your segmentation system.

Select a Segmentation System

PRIZM Premier

P$YCLE Premier

ConneXions

identify
deliver
optimize

2. Select your profile/s.

Select Profile

Profile Tree

| 🔍 | Search | Clear Selection | Save List | My Lists |

> 📁 My Profiles
> 📁 Claritas Profiles

3. (Optional) Determine if you want to project your profile to an analysis area.

Analysis Area Profile Projection   **ON**

4. Select your analysis area.

Select an Analysis Area

Select the geographic region (analysis area) in which you would like to analyze.

| 🔍 | Search | Clear Selection | Save List | My Lists |

> 📁 My Analysis Area
   📄 United States (USA)
> 📁 State (STA)
> 📁 Combined Statistical Area (CSA)
> 📁 Nielsen Designated Market Area (DMA)
> 📁 Three-Digit ZIP Code (TDZ)
> 📁 Core Based Statistical Area (CBS)
> 📁 County (CTY)
> 📁 Census Place (PLA)
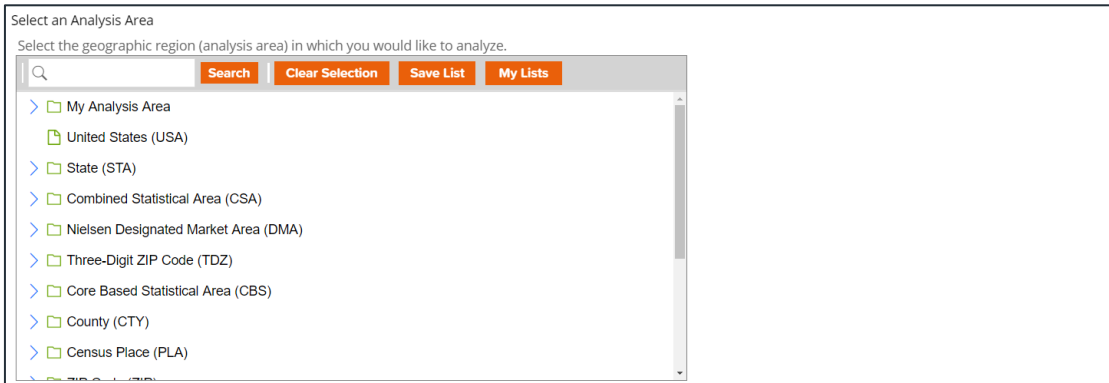
5. Choose a projection data set: Households or 5 Year Households.
   Note: If you license ZIP+6 level distributions, it is generally recommended to select Households (ZIP+6 Based) as your base, as this level provides a greater level of granularity for the segment distributions than the ZIP+4 level.

Select a Projection Data Set

| Households (ZIP+4 Based) ⦿ | Five Year Households (ZIP+4 Based) ◯ | Households (ZIP+6 Based) ◯ |

claritas
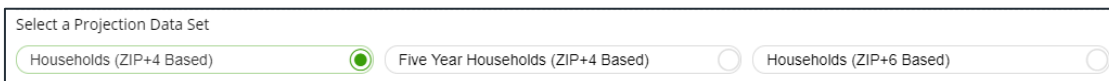
Specify a Sort Method

You'll be prompted to make the following selections:

SORT/SUBTOTAL PROMPTS	
SORT/SUBTOTAL PROMPT	ADDITIONAL INFORMATION
Sort method	Sets the method used for sorting your records. The selected sort method will affect which of the remaining sort/subtotal options will appear.
Sort profile	This is the profile that the report will be sorted on.
Sort measure	This is the measure tied to the sort profile that will be used for the basis of sorting.
Sort direction	The options are ascending and descending.
Subtotal method	Sets the method used for grouping the records into subtotals. The selected subtotal method will affect which of the remaining subtotal options will appear.
Number of ranges	Sets the number of subtotal groups included in your report.
Subtotal measure	Sets the measure that will be used for the basis of subtotaling.

1. Select a sort method. The options are:

SORT METHODS	
SORT METHOD	DEFINITION
Sort method	Sets the method used for sorting your records. The selected sort method will affect which of the remaining sort/subtotal options will appear.
Sort profile	This is the profile that the report will be sorted on.

2. (Optional) If you selected Report Selection as the sort method, you'll be prompted to select a sort profile and sort measure.

    Note: The list of available sort profiles will be dependent on the profiles you selected in the previous Select Profile(s) prompt.

3. Select a sort direction.

Select a sort direction

| Ascending | ⊙ | Descending | ○ |

4. (Optional) If you selected Report Selection as the sort method, you'll be prompted to select a subtotal method. The options are:

SUBTOTAL METHODS	
SUBTOTAL METHOD	**DEFINITION**
None	No subtotal applied.
Equal Ranges	Groups areas (rows) based on the values of a specific variable – Each subtotal group will have an equal minimum/maximum range for the specified variable
Equal Records	Uses basic division to group the number of areas (rows) equally – Each subtotal group will have an equal number of areas.
n-Tile	Distributes the total number of households in an area into equal groups that are approximately equal, such as fourths or fifths. Dividing data in equal portions ranks the analysis areas by marketing potential, in groups showing the strongest to weakest.
Target Group	Uses target groups to group the records.

If you select the Equal Ranges or Equal Records subtotal method, you need to specify the following:

- Number of ranges: select your desired number of groupings

If you select n-Tile subtotal method, you need to specify the following:

- Number of ranges: select your desired number of groupings
- Subtotal measure: select the desired measure to use for equal grouping

If you select the Target Group subtotal method, you'll need to specify the following:

- Target Groups: Below Target Group Tree, navigate to and select the target group you want to use for grouping.

Select Additional Options & Output Type

1. (Optional) If you would like Segment Descriptors included in your report data, check the box(es) next to the descriptor(s) you'd like appended.

Segment Descriptors	
Household Age Range	☐
Household Composition	☐
Household Education	☐
Household Employment	☐
Household IPA Class	☐
Household Income	☐
Household Tenure	☐
Lifestage Group	☐

2. Select an output type: Excel or Interactive.

   a. If Excel, select your email delivery option.

   b. If Interactive, specify if you'd like email notification when the report completes.

3. Enter a Report Name. Click Submit.

Enter a Report Name	Profile Worksheet	⊗

REVIEW REPORT OUTPUT

If Creating Excel Output

1. While the report generates, you are given the option to navigate away from the current page.

Report Status ⟳

Your report is being generated. You may continue to wait for your report to complete, or you can navigate away from this page and retrieve it later on the "My Content" page.
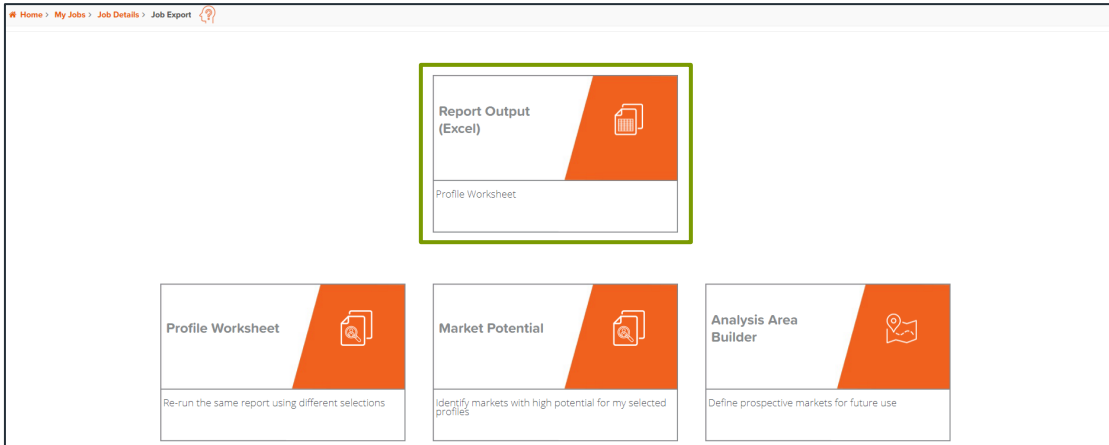
Create another report of this type.
Create a different report type.
Go to my content.
Go to my jobs.

2. After the report generates, click Report Output to view your report.

If Creating Interactive Output

1. Once your report generates it will be displayed on the screen.