

# PolicyMap Primer

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Welcome! At PolicyMap, we believe in the power of information to drive change in communities and markets. In pursuit of our mission, we're proud to have built the largest geo-database on the web, entirely accessible without advanced training. We're one place, all online where folks can easily find and visualize data as they incorporate it in their work.

PolicyMap uses cutting edge technology that allows you to manipulate data using highly sophisticated, fast and draggable maps. The ability to dynamically render and customize thousands of shaded maps sets this technology apart, making it especially suited for interactive research and data analysis.

PolicyMap launched in 2008 as a service of Reinvestment Fund, a non-profit community development financial institution that finances homes, schools, businesses, supermarkets and other projects that build wealth and opportunity for the people and places that need it the most.

This guide, along with our video tutorials, is designed to help you navigate PolicyMap. If you have any questions, please contact us at (866) 923-MAPS or send us an email at [info@policymap.com](mailto:info@policymap.com). We are here to help.

## Maps

**Overview** - The Maps page consists of features available to both registered users and subscribers. Its primary function is to easily visualize data at various geographies.

**Login** – Log into your account to save and print your maps and tables. Registration is free. *Subscribers* or *trial users* need to login to see custom subscription features and proprietary datasets.

**Viewing the map** – You can zoom in and out by double-clicking the map or using the zoom-level bar in the upper right of the map. To pan across the map, click and hold your left mouse button on the map, then drag the map within the map window.

**Search Bar** – To start, you should specify a location. The search bar allows you to quickly find and position the map to different locations. Similar to most online mapping tools, you can search for locations by an address, type of geography (e.g. zip code, city, county, or state), census tract, congressional district, school district, state legislative boundaries, or metro areas.

1. **Location** – The default search option is a location. Enter an address or geography in the search bar and click the magnifying glass button or the Enter/Return key. If searching by a type of geography, like Philadelphia, you will see a listing of all places in the US which has a similar name in the suggestive text box. If more than one location in the US has the same name, the map will default to the largest populated location, and a message box will appear listing all matching locations by population. If you are searching by an address, the map will zoom to the address and drop a pin.



2. **Census Tract / Block Groups**– If you are searching for a specific census tract or blockgroup, select Census Tract or Block Group from the search menu. Enter the FIPS code and the map will locate and highlight the boundary for that geography. The suggested locations for tracts and blockgroups will appear after the 9th digit for tracts and 10th digit for blockgroups, and both will display the boundary year(s) each location was created by the US Census.



3. **Other Search Options** – Also from the drop down menu, you can search by Congressional Districts, School Districts, State District (local state House and Senate districts), or Metro areas (CBSAs). To search by one of these categories, select its tab above the search bar, choose the state and either select from the drop down menu or enter a district name.



### Tips for finding a location:

- For best results when searching by address: use a street address and zip code only, use street abbreviations such as “Ave” or “St,” and remove apartment numbers.
- Suggested locations for census tracts and blockgroups will appear after the 9th digit for tracts and 10th digit for blockgroups, and both will display the boundary year(s) each location was created by the US Census.
- If you need to look up a census tract number, search the map for the general area in which the tract is located (such as a street address or county). Click onto the map without data loaded, and you can view tract number in the Info Bubble.
- When searching for state House and Senate districts, select “Upper House District” to search for the state senate, and “Lower House District” for state House districts.
- When searching for a school district, select the state from the drop down box and then enter the name of the district.

## Data Menus

**Adding Data** – PolicyMap gives you an innovative and easy way to view data through thematic maps. To add a layer of data, just select a category from tabs above the map, drill down the menu or secondary-menu and select the data layer. We have thousands of data layers to choose and you can learn more about each data layer on our website at the Our Data tab ([www.policymap.com/data/our-data/](http://www.policymap.com/data/our-data/)).

The data menu is now broken up into four (4) sections.

1. **Data Layers** will list all thematic data layers. These data layers will display on the map as colored maps, with the varying of colors based on the ranges in the legend.
2. **Data Points** list all address level datasets processed and loaded by PolicyMap. These datasets will display as icons of addresses for that particular data. The legend will show the icon for the datasets as well as options for searching or filtering.
3. **Subscriber Shared Data** are datasets which have been created by users via the Data Loader who have selected to share that data with all users on PolicyMap. Learn more about this in the Data Loader section.
4. The last column gives links to similar data layers in the Quick Answer section or helpful links to a PolicyMap blog article related to the data category.

The screenshot shows the PolicyMap interface with the 'My Data' tab selected. The main content area is divided into four sections, each highlighted with a red box and a numbered callout:

- 1** **Data Layers**: A list of thematic data layers such as 'Home Sales', 'Home Values', 'Rents and Rental Units', and 'Residential Homes and'. The 'Homes by Value' layer is selected, showing a legend with value ranges like 'Less than \$100,000'.
- 2** **Data Points**: A list of address-level datasets including 'Federal Housing Data', 'Local Foreclosures', and 'Chicago Area Foreclosures'.
- 3** **Subscriber Shared Data**: A list of datasets uploaded by other users, such as 'AchieveAbility', 'CommonBond Communities', and 'Crispus Attucks Residential Properties'.
- 4** **Quick Answer**: A sidebar containing 'HOUSING NEWS' (e.g., 'Low Income Housing Tax Credit Sites Updated') and 'QUICK MAPS' (e.g., 'How many homeowners over the age of 65 are burdened by their housing costs?').

**My Data** - The My Data tab will list any point/address datasets shared to your account and datasets that you have marked as favorites. Subscribers and trial users will see a list of any datasets uploaded in the account, with the ability to open, edit, download, or delete a dataset. You must be logged in to utilize to see data in the tab. The menu is broken into 3 sections;

1. **My Uploaded Data** will display all datasets created in the account and also datasets processed and uploaded by PolicyMap.
2. **Data Shared with Me** are datasets that other users have uploaded using the Data Loader and have selected to share with me.
3. **My Favorites** will display data layers that you have marked as a favorite.

The screenshot shows the 'My Data' tab with three sections, each highlighted with a red box and a numbered callout:

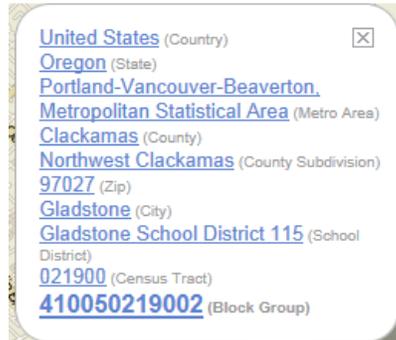
- 1** **MY UPLOADED DATA**: A table listing datasets created by the user, including 'Philadelphia City Owned Properties', 'Phila Childcare - Uncertified', and 'Phila Childcare - InfoUSA'.
- 2** **DATA SHARED WITH ME**: A table listing datasets shared by other users, including 'Houston LIHTC', 'NSP in PA', 'Seattle Parks', and 'The Program'.
- 3** **MY FAVORITES**: A list of favorite datasets, including 'Education... > At least a Bachelor's Degree', 'Education > Population... > Bachelor's Degree', and 'Education > Population... > High School Diploma'.

## Map Features

After selecting and loading a data layer, users can click onto the map to open the “Info Bubble” which will give the value for the geography selected, as well as the values for the locations the geography sits within. This geography will also be highlighted with an orange boundary on the map.

**Identify Bubble (or ID Bubble)** – Click anywhere on the map to display a bubble for that location, without a data layer added, the bubble will display the selected location’s block group, census tract, county, school district, and other geographic identifiers.

**Info Bubble** – If you click a geography on the map while a data layer is loaded, it will show the value of the data layer for the shaded area, as well as the values for the larger geographies in which it sits. The Info Bubble will give users the option to create a report about the highlighted area (“Get Report”) or display all the geographies in the bubble into a table to compare (“See Table”).



Info Bubble (without data)

This screenshot shows an Info Bubble titled "Info Bubble (with data)". It displays a table of population values for various geographies. The table has two columns: "Area" and "Value".

Area	Value
Oregon (State)	3,831,074
Portland-Vancouver-Clackamas (County)	375,992
Northwest Clackamas (County Subdivision)	248,731
Gladstone (City)	11,497
021900 (Census Tract)	3,515
410050219002 (Block Group)	1,190

Below the table, there are links for "See Table" and "Get Report".

Info Bubble (with data)

**Map Title** – When a data layer is on the map, you will see a Map Title above the map. This is a simple sentence describing the data layer. Select the Map Title to view a more detailed description of the data layer and a link to our data directory. Close will minimize the description. Click the “X” icon to clear the data layer from the map.

This screenshot shows a map interface with a navigation bar at the top containing tabs: My Data, Demographics, Incomes & Spending, Housing, Lending, Quality of Life, Economy, Education, Health, Federal Guidelines, and Analytics. Below the navigation bar, there is a data layer title: "Estimated population between 2008-2012." with a star icon and a close icon. Below the title, there is a detailed description box with the text: "Estimated count of population between 2008-2012. These data are mapped to the 2010 Census boundaries. (see data directory)". A "CLOSE" button is located at the bottom of the description box.

**Favorites** –When you load a data layer, you can select the star icon  next to the map title to mark this as a favorite. The My Data tab will show a complete list of your favorites and give you the ability to remove favorites.

This screenshot shows a map interface with a navigation bar at the top containing tabs: My Data, Demographics, Incomes & Spending, Housing, Lending, Quality of Life, Jobs, Education, Health, Federal Guidelines, and Analytics. Below the navigation bar, there is a data layer title: "Estimated typical (median) income of a household between 2007-2011." with a star icon and a close icon.

**Map Boundaries** – The Map Boundaries menu on the bottom of the map allows you to overlay geographic boundaries onto the map. Depending on your zoom level, you can overlay county, zip code, census tract, or block group lines as well as congressional and school districts, and many more. Some boundaries are only available depending on the zoom level. Some local boundaries are not shown by default and can be added to your account, see the list here <https://www.policymap.com/blog/?p=16655>.

- By default, **Freeways and Roads** and **Parks, Water, and Land Use** are displayed so can be turned off in the menu.

**Satellite** – The Satellite layer allows users to display Google’s aerial maps side by side a PolicyMap map. Once loaded, users can zoom in or out and pan within either map. Click to open the ID Bubble will also draw the boundary for the location. Google’s aerials have additional zoom levels, the option to remove labels, and when a data layer is loaded, users can add or remove the layer and control the transparency.



*Please note; due to terms of use, printouts will not display the satellite layer.*

**Clear Location** – Clear Location will remove any location boundaries **and** custom regions on your map, while keeping any data layer and/or sites displayed.

**Reset Map** – This will reset the zoom to the default of the United States and remove any data displayed on the map.

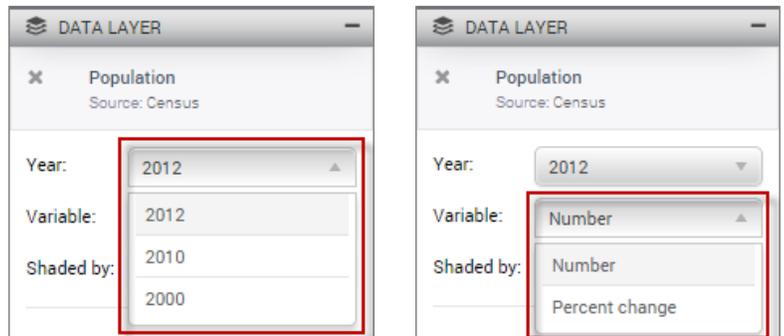
## Data Layers

**Data Layer Legend** – When a data layer is added, the Legend will display specific information about the current data layer (e.g. Year, Variable, Range Values, etc.) and the values for each color on the map. The legend also gives you the ability to customize the map by changing the year, how the data is displayed, or making your own custom ranges.

The legend can be moved to any location on the map. Click onto the header of the legend (the icon will change to), hold the mouse button down, and drag; the legend will snap to the map edges. You can also minimize the legend by selecting the “—” icon.

**Changing Years and Variables** – Depending on the data layer added you can toggle between available years, quarters, or even months. Some years are only available to *subscribers* and *trial users*.

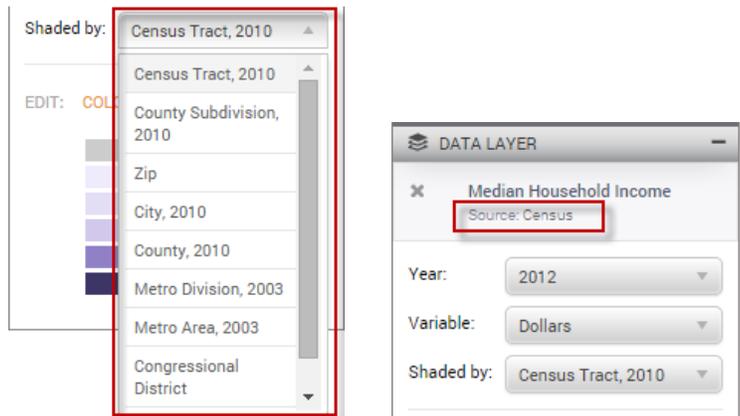
Changing the variable will change how the data is displayed on the map. You can toggle between different variables, including the number, median value, percent, or even the change across years depending on the Data Layer displayed.



**Data Shade by & Source** – PolicyMap can display data at different geography levels; the zoom level determines what geography the map is shaded by. For example, when looking at the nation, data can be shaded by states. As you zoom in, shading might change to the county, zip code, census tract, and finally block group level depending on the availability of geographies for the dataset.

The “shaded by” pull down menu gives you the ability to change the geography at which the current data layer is shaded and also shaded by other unique geographies like congressional districts, county subdivisions, and more. For example, you can create maps of Philadelphia County by zip code or city, instead of the default shade level of census tracts.

The legend always contains the source for the data being displayed. Whenever possible, the source is presented as a live link providing you with more information about that source by taking you to the data directory.

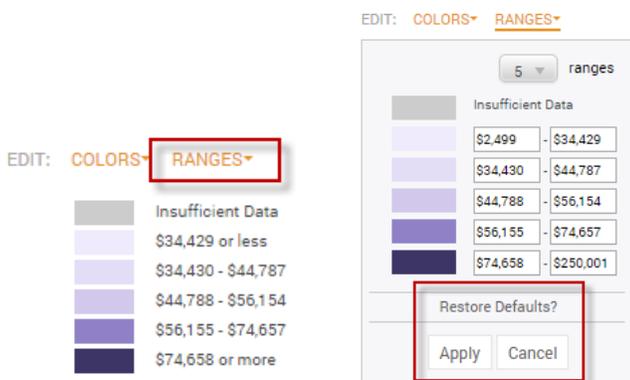


Change Shade By

Source of current data

**Change Colors** – *Subscribers* or *trial users* can change the color spectrum used on the shaded map.

**Number of Ranges** – *Subscribers* and *trial users* can increase or decrease the number of ranges shown on the map using the pull down menu.



Edit Ranges

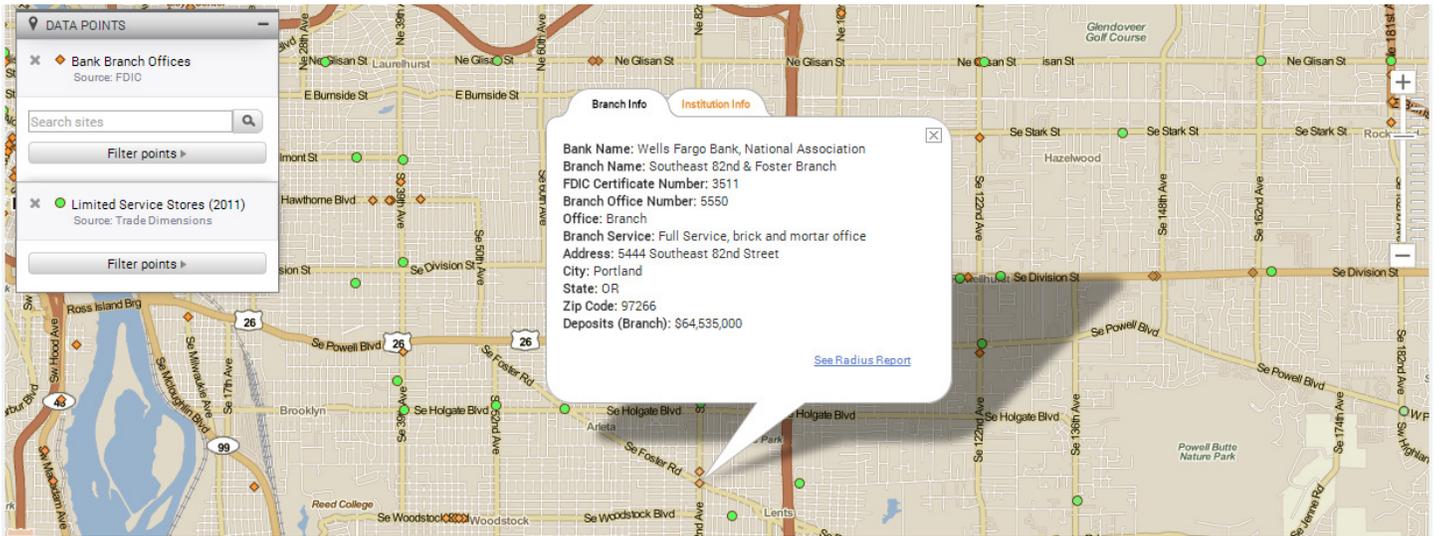
Apply/Restore

**Edit Ranges** – *Subscribers* and *trial users* have the ability to create custom values for each range. To edit, click Ranges in the legend, this will open text boxes for each range, then define the values for each range. When you are done editing your ranges, click one of the Apply options to show the custom ranges on the map. Default will revert ranges back to default.

**Note:** Editing ranges will be applied for all years available for the data layer. This is helpful to see how data is changed across years.

## Data Points

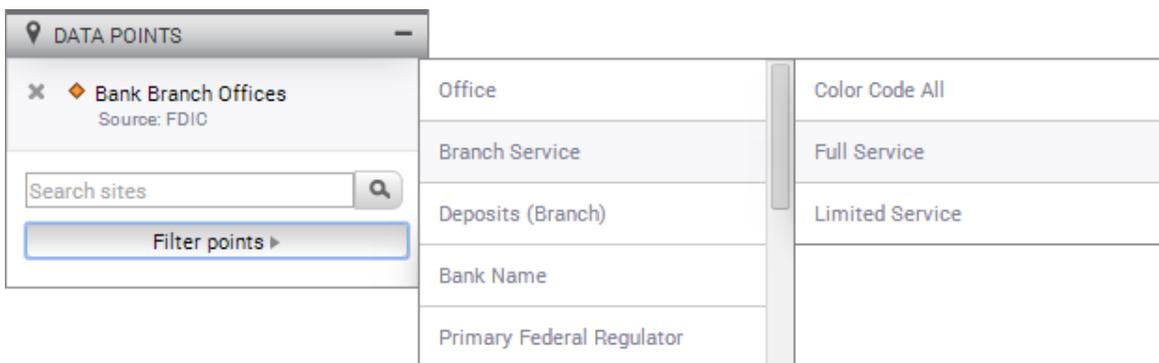
**Adding Data Points**– Data Points display data as icons of addresses on the map. You can view these points by themselves or on top of a Data Layer. Click on any point to display information about that location in the info bubble. Once Data Points are loaded, the legend will appear on the map and users can select the icon on the map to see more information about that location.



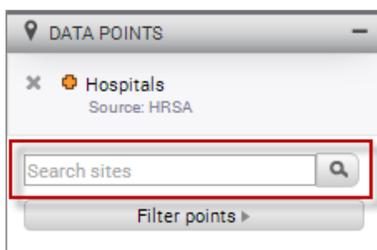
**Data Points Legend** - Users can use the legend to filter points on the map or search.

- Filter datasets, to use the filter option, select the filter from the menu in the legend. Users can apply multiple filters to any dataset or color code one filter.
- Users can remove any site dataset or a filter(s) by clicking X symbol in the legend.

**Data Points Filters** - Use the filters option to show only address(es) that match a specific filter or even color code. To use the filter option, select the [filter points](#) button in the legend and a menu of filter options will appear, select the indicator you want to filter by. For example, if you load [Lending > Bank Branches Offices](#), you can then choose to filter and show only full service branch locations.



(Note: not all point datasets will have filter options so look for the icon)

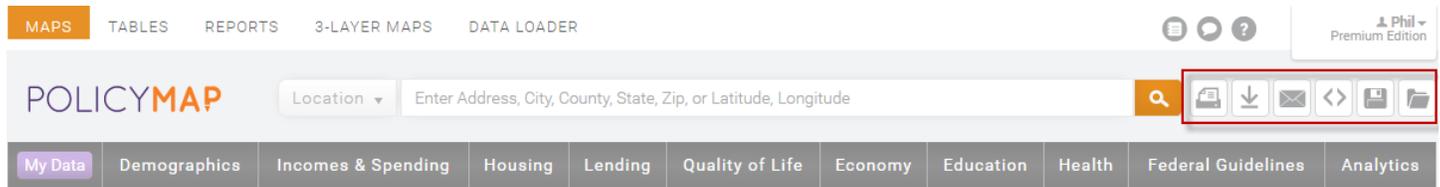


**Searching Add Sites** – After loading a point dataset you can search for the name of any location in that dataset. Load a point dataset, simply enter the name of the location that you are searching for and hit the enter key or select the icon. This will zoom to the point and open the Info Bubble for more information.

The search feature also uses predictive text, so entering the first 3 letters of a location will display a list of all locations the start with the 3 letters. This is a very helpful if you are not familiar with the exact name of a location.

## Map Features and Functionality

Print, Save, Download, and Email options are located on the top right of all pages



**Print** – Printing gives you the option to print as a PDF for an 8x11 printout or PNG file enabling you to insert maps to a Word document, PowerPoint, or other electronic document.

The print icon will open a print preview page with many options for customization, including;

- custom text for the filename, map title, and data description,
- increasing the font size to the legend and map title,
- removing the map title and legend completely,
- removing the boundaries on the map,
- island print to only show data in your location,
- and add margins to the printout.

After you select Export, the file will download to your computer.

The screenshot shows the 'Export as an image' dialog box in PolicyMap. The dialog has a title bar with a close button. The main content area is titled 'Export as an image' and contains a map of a region with a legend for 'Median Household Income'. The legend shows five income ranges: \$32,500 or less, \$32,501 - \$44,318, \$44,319 - \$56,609, \$56,610 - \$77,188, and \$77,189 or more. The map shows various areas shaded according to these ranges. To the left of the map are several options for exporting the image: 'Export' button, 'Filename' field (PolicyMap Map), 'Text size' (Aa Aa), 'Landscape' and 'Portrait' orientation options, 'PDF' and 'PNG' format options, 'Title' checkbox (checked) with a text field (Estimated typical (med...)), and 'Include legend(s):' checkbox (checked) with 'Median Household Income' selected. There is also a 'More options +' button.

 **Email** – The quickest way to share a map with another person is to use the Email feature. This will send an email with a link of a map with your current location, any data layer added, and/or sites loaded. You can only email maps of public data and features.

 **Save** – You can save any map you create by selecting the Save icon. PolicyMap will give your map a default name or you can create your own custom name. Select “save” and your map will be saved to [My Saved Work](#).

 **Embed a Map** – If you want to add a fully interactive map from PolicyMap to a website, blog, or online forum, the embed feature allows you to capture your current map and gives you the HTML code to place onto another website. Select Embed to start the process. Set the dimensions at which you want the map to display. The default size will be your current screen resolution, but we suggest nothing larger than 640 x 500. Lastly, decide if your interactive map needs a Map Title and/or Legend. Click Embed when you are done and you will be given an HTML iframe code to copy and paste onto your website, blog, or forum.

 **Download Data** – To download on PolicyMap, *you need to be a subscriber*. Simply add data to your Map or Table to get started learning about the great features with the data download tool.

The Data Download window has 3 simple steps:

 **Step 1**  
Select Data

 **Step 2**  
Select Location

 **Step 3**  
Confirm Download

**Step 1** will list what type of data you can download. This list is based on what data you have already loaded before opening the Data Download.

**Step 2** gives users the option to select the location for which to download data. This can be pre-defined locations like states, counties, congressional districts, and more, but locations can also be custom regions.

**Step 3** confirms the data to be downloaded with a simple sentence that indicates the data, year, aggregated geography, and location.

There are 3 different types of data that can be downloaded:



**Layer**

Layer which is data aggregated to geographies like tracts, counties, and states



**Points**

Points which is address level data



**Points with Layer Data**

Points with Layer Data which is the ability to find the geography and data which an address sits on.

## Layer

To download layer data, simply add a data layer onto the map, identify what year or variable in the legend, and select the download icon.

Step 1 Select Data   Step 2 Select Location   Step 3 Confirm Download

### Confirm the data you wish to download.

Choose only one

Next  
Select Location

Layer  
Estimated population between 2010-2014

Points

Points with Layer Data

Add Point data to your map.

Add both Layer and Point data to your map.

- **Step 1** will show the data layer, the variable, and year.
- Select Next
- **Step 2** will show the location for your data download. If you had a location and/or custom region loaded on the Maps, Tables, or 3 Layer Maps, that will be shown in step 2. Otherwise, use the Add button to select a saved Custom Region or use the Change button to access the Location bar to add a new location.
  - Once a location is listed, select what geography to download from the **Shaded By** menu.
  - *The **Shaded By** menu allows users to download data for the data layer for any available geography equal to or smaller than the location.*
  - For example, if Pennsylvania is listed, users can download data for the State or all the way down to a blockgroup.
- Select Next
- **Step 3** will display a complete sentence which will describe:
  - the data that is being downloaded,
  - year or period of years,
  - the geography that the data will be downloaded at, also called the Shade By,
  - and the location or area for the download.

Step 1 Select Data   Step 2 Select Location   Step 3 Confirm Download

### Confirm your data download.

< Download CSV

**Data**  
Estimated population between 2010-2014 by Census Tract  
in Pennsylvania.  
**Year**  
**Location**  
**Geography**

- Select **Download CSV**

At any time, users can go back to any of the previous steps. Going to **Step 1** to change what data to download and **Step 2** to change the Shaded By selection will change the location and geography to download. If users need additional years or variables for the data layer, close the data download modal, change the year or variable in the legend, and repeat the data download steps.

Layer data downloads will show the geography, the FIPS code for that geography (if available), the data, source of the data, and location that the data was generated for.

## Points

To download point data, add a point dataset (or multiple point datasets) onto the map, set any filters if needed, and then select the download icon.

- **Step 1** will show the point dataset. Because users can have multiple point datasets loaded on maps, tables, and 3 Layer Maps, users might see a list of datasets from which to choose. If filters were set, it will note that it is filtered.
- Select Next
- **Step 2** will show the location for which to download data. If you had a location or custom region loaded on the maps, tables, or 3 Layer Maps, that will be shown in step 2. Otherwise, use the Add or Change buttons to add a new location or custom region.
  - There is not a Shaded By option similar to Layers since you are simply downloading all the addresses within a location.
- Select Next
- **Step 3** will display a complete sentence which will describe:
  - the point dataset and
  - location to download.
  - If there was a filter used, then the text below will display the filter.

- Select **Download CSV**

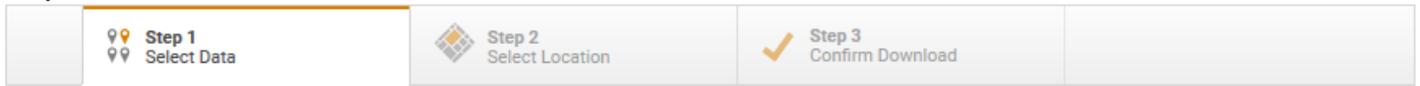
At any time, users can go back to any of the previous steps. Going to **Step 1** to change what data to download and **Step 2** will change the location and geography to download.

Point dataset downloads will give users all the data for each address, source of the data, and location the data was generated for.

## Points with Layer Data

Points with Layer Data is the unique ability to find the geography and data in which an address sits. For our advanced GIS users, this will join an address to a geography and give the FIPS code and data for that geography (or geographies). For the Points with Layer function to be available, **you must have a point dataset AND a data layer loaded.**

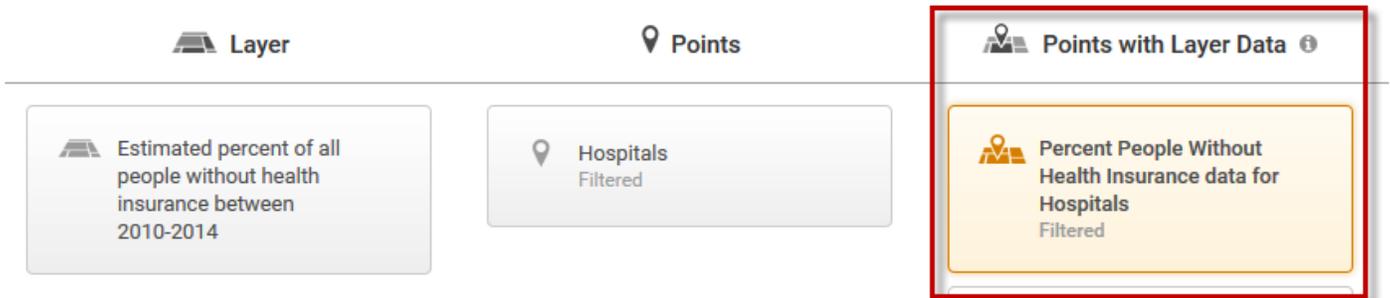
To start, add a point dataset (and set any filters if needed), then add a data layer and identify what year and variable to download, and finally select the download icon.



### Select the data you wish to download.

Choose only one

Next  
Select Location



- **Step 1** will show the data layer and what point dataset to download for.
  - If you have multiple point datasets loaded, the list will show multiple selections
- Select Next
- **Step 2** will show the location to download data for. If you had a location or custom region loaded on the maps, tables, or 3 Layer Maps, that will be shown in step 2. Otherwise, use the Add or Change buttons to add a new location or custom region.
  - Once a location is listed, select what geography to download from the **Shaded By** menu.
  - If you are downloading Points with Layers for blockgroups, the largest location you can download is a State. If you have a custom region larger than a State, it will require you to reduce the location to State.
- Select Next
- **Step 3** will display a complete sentence which will describe:
  - the data layer that is being downloaded,
  - year or period of years,
  - the point dataset,
  - the aggregated geography the data will be download for, also called the Shaded By,
  - and the location or area for the download.



### Confirm your data download.

< Download CSV

Data Layer

Year

Estimated population between 2010-2014 data for  
Hospitals by County in Pennsylvania.

Point Data

Geography

Location

- Select *Download CSV*

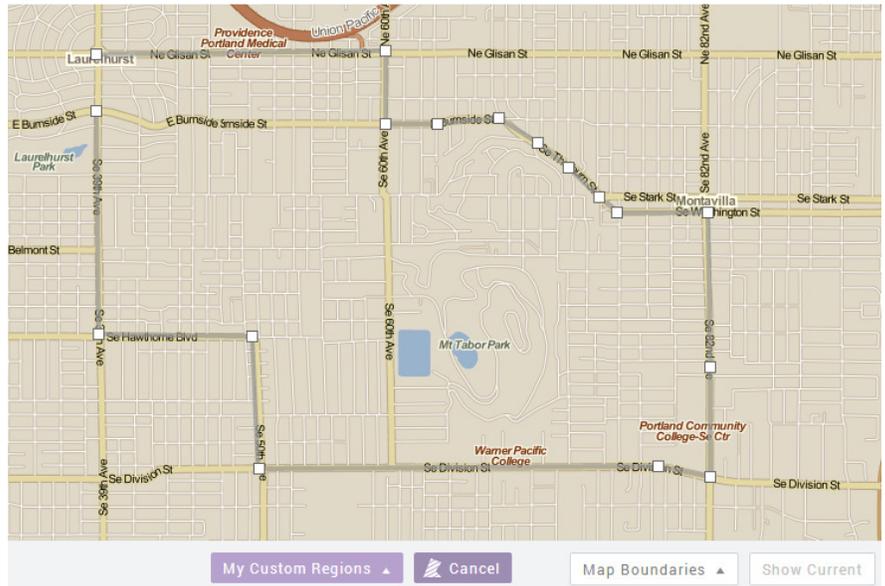
Please Note: *Due to the size and complexity of the Points with Layer download, these files will be emailed to you, and a copy will be saved in your My Saved Work.*

## Custom Regions

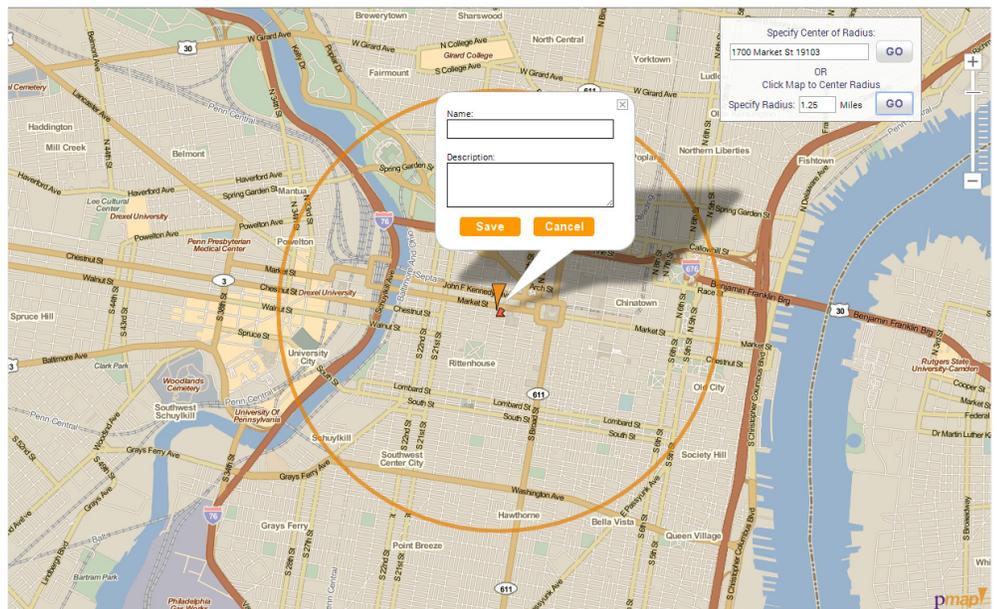
Subscribers and trial users can create their own unique areas on the map, and then build reports or query data for those areas. Subscribers can draw a custom region right on top of the map; these custom regions can cross predefined geographic boundaries like census tracts, zip codes, and counties.

Users can also draw a radius around an address or assemble a grouping of boundaries – like block groups, census tracts or zip codes - to create a custom region. To use these features, click “Create” in the bar along the bottom of the map and choose one of the three (3) types of custom regions: Drawn, Assembled, or Radius.

**Draw Custom Region** – This allows you to freely draw a custom region on top of the map. After selecting OK (read the instructions for details), your mouse pointer will appear as crosshairs. To begin drawing the boundaries of your desired region, click once on the map to create the corners of your custom region. The grey line that appears shows the boundary as you draw it. You can pan around the map by holding down the left mouse button while building a custom region or zoom in and out using the zoom bar on the left of the map. Close the custom region by clicking on the first point again. Once you close your custom region, enter a name and add an optional description in the dialogue box, then select Save. All saved custom regions will be available in your **My Custom Regions** menu. If you make a mistake while drawing your region and want to start over, simply select Cancel from the bar along the bottom of the map, and then re-select Create to start again.

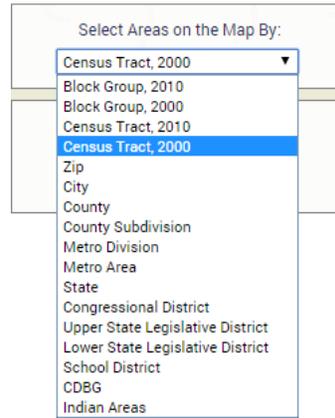


**Custom Region by Radius** – Allows you to create a radius boundary around a particular address or by clicking onto the map. You can enter an address in the “Specify Center of Radius” and specify the size of the radius and click GO, or set the size of your radius and click anywhere on the map. Clicking onto the map, will display the latitude and longitude of your location in the “Specify Center of Radius” field; both actions will give you the ability to give your custom region a name and save. If you make a mistake when clicking the map, select Cancel will clear the custom region and you can click again on the map. If you make a mistake, select Cancel and enter a new address in the “Specify Center of Radius” window and click GO. Click Save when you are done. All saved custom regions will be available in your **My Custom Regions** menu.



**NOTE:** The radius custom region has a 10-mile limit. For users who need data for an area larger than the limit in Reports, create a radius custom region first and then generate a report.

**Assembled Custom Region** – This option gives you the ability to select and group geographies (e.g. census tracts, zip codes, etc.) to create a custom region. After choosing Assembled Custom Region and selecting OK (read the instructions for details), the map will display the predefined geographic boundary for your current zoom level. You can change the boundary by choosing from the drop down menu in the “Select Areas on the Map By” window. To start, click within a boundary and the area will highlight. You’ll see the name of the highlighted boundary in the “Click Map to Assemble Region” window; continue to select other areas to assemble your custom region. To remove an area you already highlighted, click it again to deselect. Assembled custom regions can be non-contiguous or not connected.

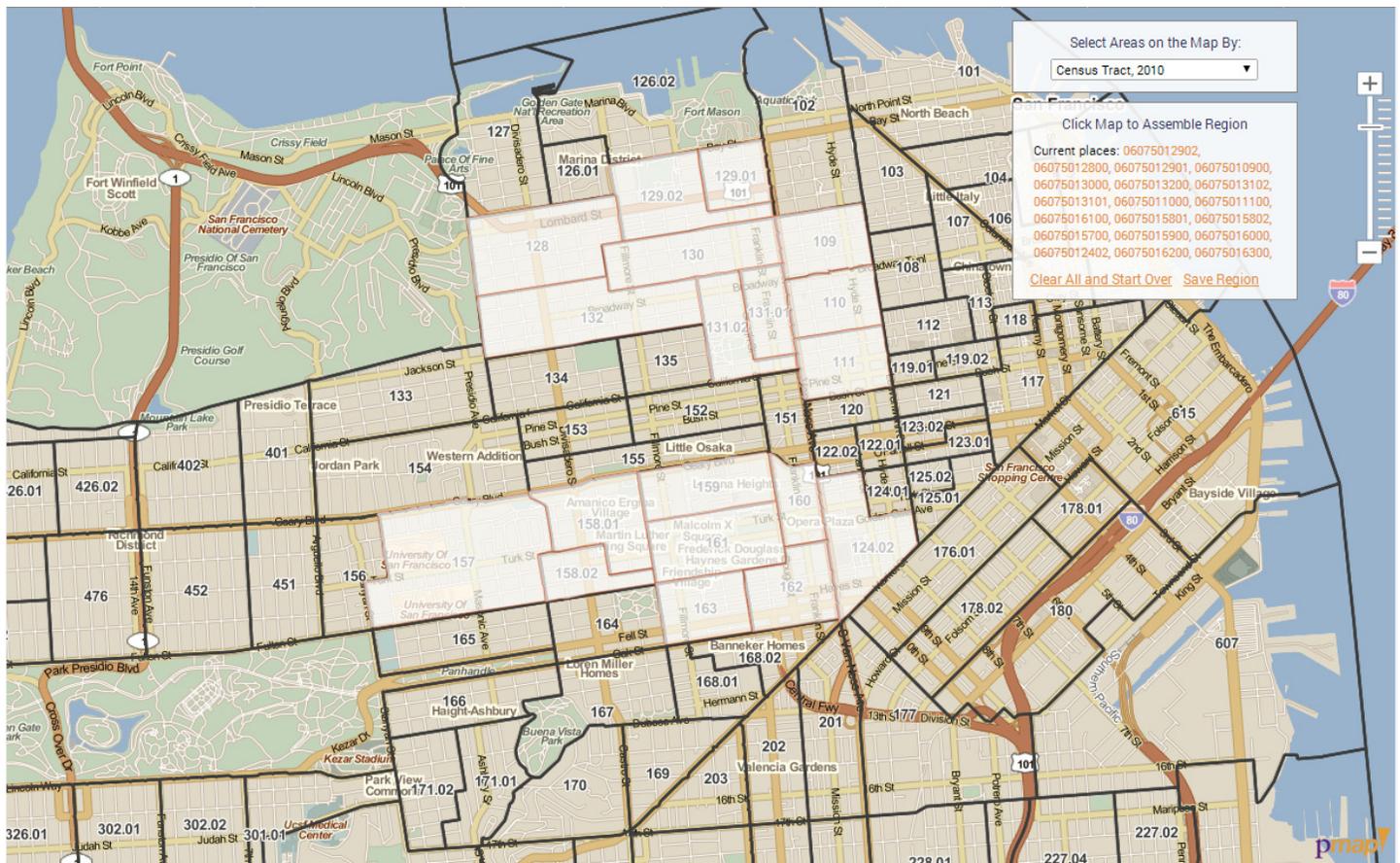


When assembling a custom region, choose from the drop down menu in the Select Areas on the Map window to determine what geography to assemble your custom region by. If you change geography, your custom region will clear and reset.

**NOTE: You cannot change the boundary type in the Select Areas pull down while making a custom region. If you do, you will lose the custom region you are assembling.**



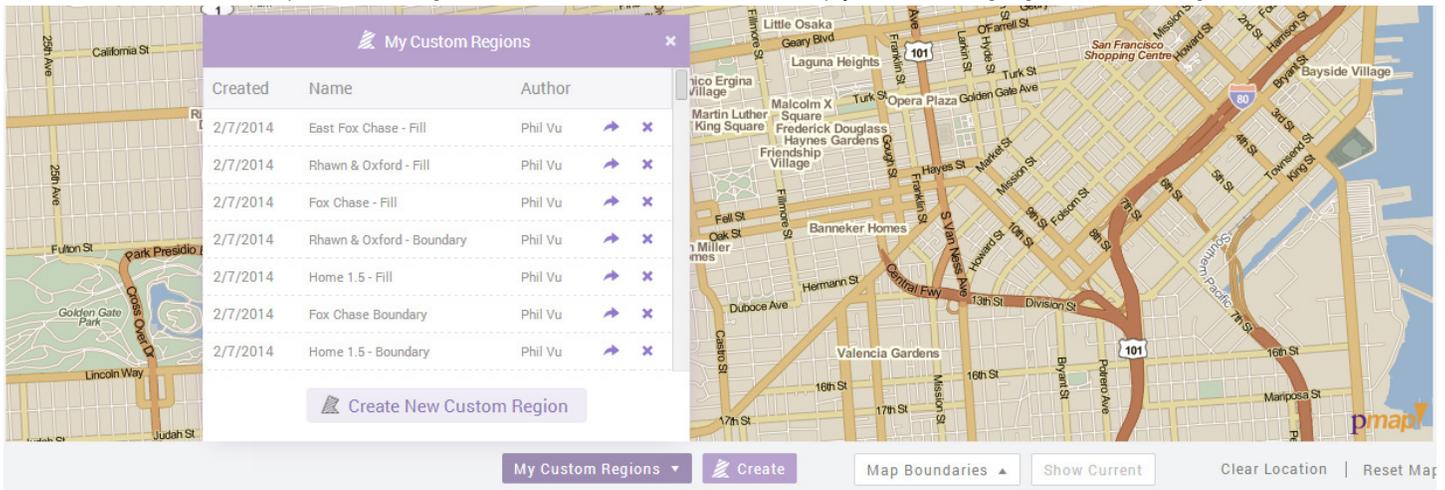
You can clear your current custom region and start over, or Save when complete.



Once you have selected the areas for your assembled custom region, select Save Region in the window, give your custom region a name, and select Save. All saved custom regions will be available in your **My Custom Regions** menu.

**Custom Region Uses** – After you create a custom region, there are various ways to use in PolicyMap

- In Maps, you can display saved custom regions by choosing from the drop down menu on the bottom left of the map. Once selected, the map will zoom to that location, display the boundary of your custom region, and highlight in the drop down menu. You can add multiple custom regions from the list, and to remove simply select the highlighted custom region.

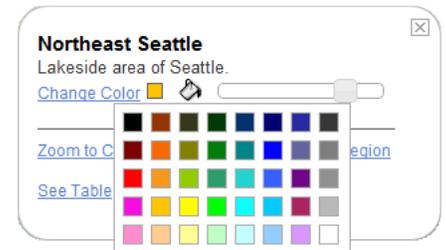


- With Tables, you can add a custom region into a table by choosing from the drop down menu on the bottom right. Custom regions will show aggregated counts in the table. **Note: tables will not show aggregate percentages or medians, you will see an N/A, but you can see the See Values feature to download the data for the geographies within the custom region.**
- In Reports, you can generate a report by selecting a Saved Custom Region or create a new custom region on the fly.
- On 3-Layer Maps, users can determine if the intersection of datasets fall within the boundaries of a custom region.

**Custom Region Features** - After creating a custom region, two icons appear along the border, the (X) will remove the custom region from the map and the (🪄) icon to open a menu of features. Custom regions also have the option to change the color of the border and even fill in the area covered by a custom region.

Customizing a Custom Region:

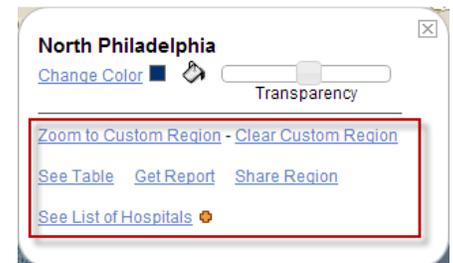
- Select the "Change Color" or (🟩) icon will open a menu of color options that users can now change the custom region border color or area filled in with.
- Click onto the (🪄) bucket icon and the custom region area will fill in with the color selected. Click the bucket again to remove the fill and just show the colored border.
- The "transparency" slide bar allows users to adjust transparency of the border or filled in area of a custom region. This is a great option when overlaying multiple custom regions with areas that might intersect.



Change color palette opened.

Custom Region Actions:

- **Zoom to Custom Region** will center the custom region to the center of the map
- **Clear Custom Region** will remove the custom region from the map
- **See Table** will open the Tables page and load the custom region
- **Get Report** will load the custom region into the Reports menu allowing users to select which report to generate data for the custom region.
- **Share Region** allows users to share the custom region with another subscriber. Enter the user's email address and optional message, and saving will email the user a notice that you have shared a custom region with their account which will now appear in the menu of saved custom regions.



**See List** will only appear if Data Points are loaded onto the map. This feature will spatially query points to determine which location is within the custom region. A menu will appear directly on top of the map.

## Tables

**Tables** - The Tables feature allows you to view data as a bar graphs, trend charts, and table, that can then be compare across multiple geographies. Parts of this feature are only available to *subscribers* and *trial users*.

Estimated typical (median) income of a household between 2007-2011. ▾

	United States (National)	Oregon (State)	Clackamas, OR (County, 2010)	Gladstone, OR (City, 2010)	41005022000, OR (Census Tract, 2010)
Median Household Income	\$52,762 <a href="#">See Values for States</a>	\$49,850 <a href="#">See Values for Counties</a>	\$63,790 <a href="#">See Values for County Subdivisions</a>	\$48,876 <a href="#">See Values for Zip Codes</a>	\$63,520 <a href="#">See Values for Block Groups</a>
Ranking		29 of 52 States <a href="#">See Rankings</a>	223 of 3221 Counties <a href="#">See Rankings</a>	11089 of 28719 Cities <a href="#">See Rankings</a>	22172 of 73013 Census Tracts <a href="#">See Rankings</a>

Bar Chart Data:

Geography	Median Household Income
United States (National)	\$52,762
Oregon (State)	\$49,850
Clackamas, OR (County, 2010)	\$63,790
Gladstone, OR (City, 2010)	\$48,876
41005022000, OR (Census Tract, 2010)	\$63,520

Year: 2011  
Across Years:  2000 - 2011  
Variable: Dollars

\*N/A indicates that data is not available for the location chosen. In some cases, data is not aggregated to specific types of locations, e.g. Zip Codes.  
\*\*At this time, negative data do not appear in the chart.

Users have two ways to create a Table. A quick way is to click the Tables link at the top left of the page and begin entering locations in the Set Location bar and load data from the Add Data Layer tabs.

**Median Household Income** [X]

Area	Value
<a href="#">United States (National)</a>	\$52,762
<a href="#">Oregon (State)</a>	\$49,850
<a href="#">Portland-Vancouver-Hillsboro, OR-WA Metro Area (Metro Area, 2003)</a>	\$57,307
<a href="#">Clackamas (County, 2010)</a>	\$63,790
<a href="#">Northwest Clackamas (County Subdivision, 2010)</a>	\$64,971
<a href="#">97027 (Zip)</a>	\$52,577
<a href="#">Gladstone (City, 2010)</a>	\$48,876
<a href="#">41005022000 (Census Tract, 2010)</a>	\$63,520
<a href="#">410050220002 (Block Group, 2010)</a>	\$63,162

[See Table](#) [Get Report](#)

You can also use the See Tables feature in the Info Bubble on the map page. When created from the Info Bubble, the table will also load the data layer from the map and all of the geographies in the Info Bubble.

You can then use the search bar to add additional locations to compare in your table. As you add more locations, they will appear in both the table and the bar graph (if a data layer is already loaded). You can delete any location by the "X" next to the name of that location.

The Tables page work similar to the Maps page. Once you have your list of geographies to compare, you can then change the data layer you are viewing by selecting a new Data Layer from the menu above.

**Data Legend** – Use the legend to toggle between available years or variables. Note: **N/A** for a geography indicates that data is not available. In some cases, data is not aggregated to specific types of geography, e.g. Zip Codes, School Districts, etc.

**Trend Chart** – Once a data layer is loaded, users can use the legend to toggle through any available years and variables; and Tables have a unique ability to show the data through trends across multiple years. To view the trend select the year period beneath: **Across Years**:

DATA

Median Household Income  
Source: Census

Year: 2011

Across Years:  2000 - 2011

Variable: Currency

**See Values** – *Subscribers* and *trial users* can download a complete spreadsheet of data for any location from the Tables page. This allows you to download all the values of data that make up a location; for instance, you can see all the values of each county in a state, zip codes in a city, census tracts in a county, etc.

For example, if you are looking to download data for census tracts in your neighborhood, then add a geography larger than a census tract (e.g. city, county, zip code, etc.) and the See Values option will list all the tracts in that geography as well as the data for each tract.

Users can also download data for custom regions and geographies without an aggregated value. If your location has an N/A as the value, the See Value function will give you the ability to download the data for the geographies that make up the location.

N/A normally occur because the Tables page will only aggregate counts, but the See Values feature will give you the ability to download data for percentages, dollar amounts, etc. allowing you to do your own calculations off PolicyMap.

	Portland, OR (City, 2010)	Gladstone, MO (City, 2010)
Population	585,888 <a href="#">See Values for Zip Codes</a>	25,635 <a href="#">See Values for Census Tracts</a>
Ranking	30 of 29431 Cities <a href="#">See Rankings</a>	1626 of 29431 Cities <a href="#">See Rankings</a>

VALUES PER CENSUS TRACT:  
**Gladstone, MO (City, 2010)**

CENSUS TRACT	ESTIMATED POPULATION BETWEEN 2008-2012.
29047021102, MO	6,632
29047021101, MO	4,496
29047021103, MO	3,591
29047021001, MO	3,650
29047021003, MO	3,855
29047021004, MO	2,985

Gladstone School District 115, OR (School District)

Aggregated values N/A for this data type  
Contains 2 Census Tracts ([See Values](#))

The See Values function works in two unique ways now. 1) If your location is larger than the smallest geography in the dataset, the See Values function will download the all the geographies **contained** within your location. (E.g. your location is a county and the data is available at the census tract level).

2) If your location is smaller than the smallest geography available in the dataset, the See Values function will download the geographies that **touches** your location. (E.g. your location is a zip code and the data is only available at the county level).

97217, OR (Zip)

Area too small for aggregation  
Touches 2 School Districts ([See Values](#))

The See Values feature has some unique rules in relation to Custom Regions

- If a custom region was drawn or a radius, the See Values feature will follow the “[Geography Rules](#)” which will show the show data for the smallest geography based on the size. For example, if you draw a 20 mile radius, the See Values feature will likely show data for Counties or even States, but if you draw a 2 mile radius, then the See Values will likely show data for Census Tracts or County Subdivisions.
- **If a custom region was assembled, the See Values feature will always try to show data for the geography used to assemble.** For example, if you assemble a group of census tracts, then the See Values will show the list of tracts and the associated values.

Use the icons in the See Values window to save or download the data.



The Save icon will save this list to the My PolicyMap page, allowing users access the list at any time.



The Download icon will download the data and name of all geographies shown in the See Values window.

*Note: Licensing agreements prohibit PolicyMap from making all datasets available for download.*

**See List** – this feature will display all the addresses from a point dataset that are contained in a geography. Users can then download a CSV file which will contain all the data each address in the query.

	Portland, OR (City, 2010) ✕	Gladstone, MO (City, 2010) ✕	Beaverton, OR (City, 2010) ✕
Points: Bank Branch Offices ✕	162 points <a href="#">See List</a>	11 points <a href="#">See List</a>	31 points <a href="#">See List</a>

**BANK BRANCH OFFICES IN:**  
**Gladstone, MO (City, 2010)**

BANK NAME	BRANCH NAME	FDIC CERTIFICATE NUMBER	BRANCH OFFICE NUMBER	OFFICE	BRANCH SERVICE	ADDRESS	CITY	STATE	ZIP CODE	NATURE OF REPORTED DEPOSITS	DEPOSITS (BRANCH)	PRIMARY SPECIALIZATION	PRIMARY FEDERAL REGULATION
Bank of America, National Association	Barry Road & North Oak Branch	3510	4799	Branch	Full Service, brick and mortar office	8320 N. Oak Trfy	Kansas City	MO	64118		\$115,533,000	All Other > \$1 Billion	Comptroller of the Currency
Bank of					Full Service	Englewood							

To use the See List feature on the Tables page, use the search bar to add places that you would like to query addresses for, then add a dataset from the Data Points section.



Add additional locations in the search bar at any time or remove locations using the “X” icon next to the name. Custom regions will also give users the ability to use the See List feature to query the total number of address which are in the region boundary.

**Rankings** – The Ranking feature allows *subscribers and trial users* to see where a location ranks among other geographies within a single dataset. Rankings will show the ranking of the location selected, see other geographies that rank above and below it and the top 10 and bottom 10 locations in that dataset.

	Portland, OR (City, 2010) ✕	Gladstone, MO (City, 2010) ✕
Population	585,888 <a href="#">See Values for Zip Codes</a>	25,635 <a href="#">See Values for Census Tracts</a>
Ranking	30 of 29431 Cities <a href="#">See Rankings</a>	1626 of 29431 Cities <a href="#">See Rankings</a>

**RANKING OF CITIES, 2010**  
**Estimated population between 2008-2012.**

RANKING	NAME	VALUE
1616.	Wyandotte, MI	25,839
1617.	Cave Spring, VA	25,836
1618.	West Fargo, ND	25,793
1619.	Sandusky, OH	25,787
1620.	Garner, NC	25,784
1621.	Xenia, OH	25,746
1622.	Bloomington, CA	25,735
1623.	Edgewood, MD	25,719
1624.	Batavia, IL	25,693
1625.	Harwood, MO	25,670

**TOP 10**

1.	New York, NY	8,199,221
2.	Los Angeles, CA	3,804,503
3.	Chicago, IL	2,702,471
4.	Houston, TX	2,107,449
5.	Philadelphia, PA	1,525,811
6.	Phoenix, AZ	1,462,368
7.	San Antonio, TX	1,335,287
8.	San Diego, CA	1,308,619
9.	Dallas, TX	1,207,202
10.	San Jose, CA	954,370

<< < 1 ...77 78 79 ...237 ...474 ...711 ...948 ...1185 ...1419 >>

## Reports

Using the Reports feature, *subscribers and trial users* can generate a detailed report for a pre-defined location, radius around an address, or custom region. PolicyMap built each report by grouping together similar datasets that help describe a location. Users can generate as many reports for as many locations needed without additional costs. All reports use the latest data available in PolicyMap, so what you see on the maps and tables, can quickly be turned into a report.

First, choose the type of report you wish to generate. Each report was created with the idea that the data in a report will better describe the area you selected. Here are descriptions of each report:

- The **Community Profile** is a snapshot of life in area, including information on its population, racial composition, age, income, workforce, and much more.
- The **Rental Housing Report** includes rent information by bedroom size, income, and affordability data.
- The **HDMA Report** is a summary of the number, typical amount, and type of home mortgages origins, including high-cost lending activity and high interest loans by race or ethnicity.
- The **Home Sale Report** provides a summary of the number of sales, median sale amount, aggregate sale amount, and loan-to-value ratio for all years and quarters available.

Once you have selected which report to generate, you can decide what area the report will generate. There are many unique ways to select or create that area:



**Pre-Defined Locations** – To generate a report based on a pre-defined location such as a state, county or census tract, click “Pre-defined Location”. Select a location by entering a zip code, city, state, county or other geography. (A pre-defined geography cannot be an address). You can also generate a report for census tracts, Congressional and State districts, school districts, and Metro Areas. Use these tabs to find one of these areas just as you would on the Map page. Click GO and then click the Generate Report button on the page that follows.



**Radius** – To generate a report for the area around an address, click “Radius”. Specify the center of the radius by typing in an address, enter the full address; including zip code. Your report area, with a default radius of half a mile (0.5), but you can change it and then click Go.

On the Preview Report Area page, users can change the radius or add a new address. The map will redraw with the radius you have chosen as a highlighted orange region. When you are ready, click Generate Report.

The screenshot displays the PolicyMap web interface. At the top, there are navigation tabs for 'MAPS', 'TABLES', 'REPORTS', '3-LAYER MAPS', and 'DATA LOADER'. The 'REPORTS' tab is active. Below the navigation, there is a search bar with the address '1210 Fuller St 19111' and a radius of '0.5' miles. The interface shows a 'Preview Report Area' section with 'Community Profile by Radius' selected. The main map area shows a street grid with a large orange circle centered on the address '1210 Fuller St 19111'. The map includes labels for various streets and landmarks like 'Rockledge' and 'Joanes Hospital'. The PolicyMap logo is visible in the bottom right corner of the map area.



**Custom Region** – To create a report based on a region of your choosing, click “Custom Region”. You can generate a report for a custom region you have already created, select from the My Custom Regions drop down menu.



**Polygon Region** – Premium subscribers have the ability to upload prebuilt custom regions called Polygons. To generate a Polygon report, premium subscribers should load their data from Add Sites and selected from the icon of the polygon and choose the option to generate a polygon report or a radius of a polygon. If you choose a radius report, the specified center will be the longitude and latitude of the centroid for the polygon.

Finally, once you have generated your report, use the icons on the top right to save or print a PDF copy to share. All saved and printed reports will be available in your My Saved Work section.

## 3-Layer Maps

**3-Layer Maps** - is a neighborhood search tool allowing you to find places that match one or up to three (3) criteria of data on a map. The 3-Layer Maps tools can be used to download a list of addresses which fall within one or multiple criteria (using Download Points) or a list of places that met the criteria set (using Download Places). 3-Layer Maps is available to *subscribers or trial users only*.

The page will look similar to the Maps page, with the search bar across the top and data categories above the map. To the left, however, you will see three legends; one for each data layer that you can add to the map. Unlike the Map feature, 3-Layer Maps allow you to overlay up to three data layers on the map at the same time. Adjusting the ranges for each data layer as it is added will allow you to find only those places which meet all of the parameters.

To begin, enter a location in the search bar (this works exactly as it does in the rest of the application).



Location ▾ Enter Address, City, County, State, or Zip 🔍

1) Next, add a **data layer** to the map. In the legend to the left, you may change the year or the variables or move the sliders to set the parameters for this data layer. In some cases, the map will instruct you to zoom in further. This is because the map defaults to loading data at the lowest geography available. As a result, to view the results on the map, you must generally be zoomed in to a city level to view *or change the Shaded By to a larger geography*.

- When you load the first data layer, the map will be completely purple. You should set a parameter by moving the triangles in the slide bar or entering value in the fields, the map will shade those areas that meet the parameter a dark purple. In this example, only places with GREATER THAN \$75,000 and LESS THAN \$190,000 will display in purple



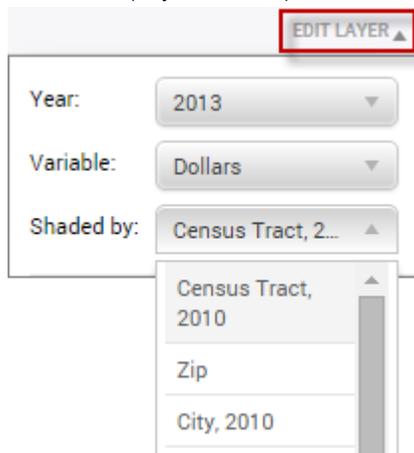
\$75,000 - \$190,000

- Click once on any purple area to see its value, which met the parameters set. Click onto any geography not in purple to also see its value and why it did not meet your parameter
- Some data layers on PolicyMap do not have ranges to select from but check-boxes. Unchecking a box will remove that indicator on the map.



Eligible  
 Not Eligible

- In some cases, the map will instruct you to zoom in further. This is because the map defaults to the smallest geography available (usually census tracts). As a result, to view the results on the map, you must zoom further into an area. The triangular symbol of the zoom bar on the map will indicator how far you must zoom in to be able to see data.
  - If you are creating a 3-Layer Map at a national or regional level, then change the Shade By to a larger geography so the data will display on the map. You will need to do this to every data layer added.



EDIT LAYER ▲

Year: 2013 ▾

Variable: Dollars ▾

Shaded by: Census Tract, 2... ▲

Census Tract, 2010

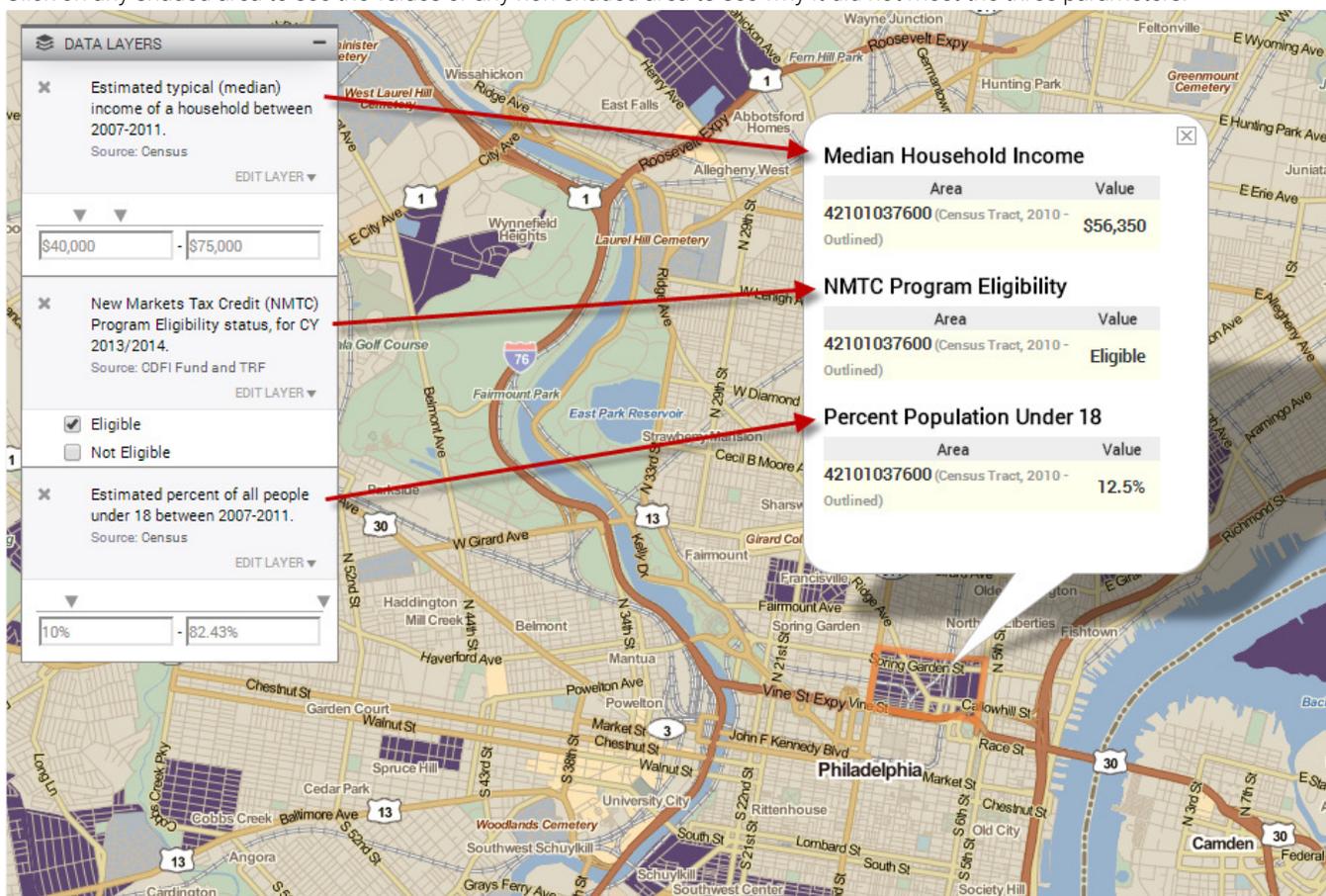
Zip

City, 2010

- To add a second layer; select another data layer from the Data Menu and follow the above steps again. Use the legend to change the year, variable, shaded by, and set the parameters for the new data layer. As you set new parameters for the second data layer, only the areas shaded purple on the map from the previous data layer will display places on the map which meet both conditions will shade a dark purple, and clicking onto each place will display the values for **both** criteria set.

*Note: the map will always show the SMALLEST geography identified in the legend. For example, if you have three (3) data layers selected for Census Tracts, School Districts, and Zip Codes, the map will display Census Tracts as that is the smallest geography of the group.*

- Finally, add a third layer in the same way and click on any shaded purple area to see the values for the three data layers on the map. Click on any shaded area to see the values or any non-shaded area to see why it did not meet the three parameters.



After you have setup the criteria for a 3-Layer Map, there are a few options to save, share, and even download the data.

**Save** will save your 3-Layer Maps criteria to your [My Saved Work](#) page. Like all print options on PolicyMap, users have the option to give a title, choose the format, and also the orientation.

**3-Layer Maps: Download Places** - the Download Places function will generate a list of geographies and data which have met the criteria setup. It is a simple and highly efficient way to query places which meet specific criteria and download that data. There are also some unique ways to use this feature to download data.

For example, if you are looking for a list of places that met just one criteria. Let's say, you are looking for zip codes with a specific income range.

- Go to 3-Layer Maps from the upper left. Once on the page, use the search bar to center the map to a given area. Even though, the map is centered on one location, the query is being processed for the entire nation.
- Select **Income & Spending > Income: Household > Median Household Income: All Households** to add the data layer.
- Choose Zip from the Data Shaded By drop down menu. The map will now show income ranges at the zip code level.
- Set your range in the legend. Now, only zip codes within the set ranges will appear on the map.
- Finally, select the Download Places List function. Give your list a custom name, select the state (or the nation) to generate the list.

	A	B	C	D	E	F
1	<b>Data Layer: Estimated typical (median) income of a household between 2007-2011.</b>					
2	<b>\$55,000 - \$65,000</b>	<b>(Variable: currency)</b>				
3	<b>State</b>	<b>Zip</b>	<b>Estimated typical (median) income of a househ</b>			
4	Pennsylvania	15004	56607			
5	Pennsylvania	15005	58003			
6	Pennsylvania	15009	55427			
7	Pennsylvania	15017	55920			
8	Pennsylvania	15020	60740			
9	Pennsylvania	15026	58489			

- The generated list is a CSV file which will show the zip codes which met the income range and the incomes for each zip code.

**3-Layer Maps: Download Points** - the Download Points function will generate a list of addresses which only fall on a geography identified by the criteria set in the 3-Layers. The list will display all the data available for the address dataset. Users can utilize this feature to query address locations against any geography a data layer(s) in PolicyMap.

For example, if you have a portfolio of investment addresses and you want to know which addresses are located in a qualified census tract for the CDFI Fund New Markets Tax Credit program. First you want to [use the Data Loader](#) to upload your list of addresses.

- Go to 3-Layer Maps from the upper left. Once on the page, use the search bar to center the map to a given area. Even though, the map is centered on one location, the query is being processed for the entire nation.
- Select **Federal Guidelines > CDFI Fund NMTC: Eligible Tracts > Eligibility Status: Eligible Tracts** to add the data layer.
- Because the NMTC data layer is a check-box option in the legend, simply uncheck the *Not Eligible* box and now the map will ONLY show census tracts which are eligible in purple.
- Now add the dataset which you have uploaded using the Data Loader. This will be located on the left of map beneath the Analytics legends.
- Finally, select **Download Points List** from the menu at the bottom of the map. This will open a popup window. Give your list a unique name by selecting the "change name", then (if you have multiple datasets loaded from the Add Sites menu) select the point set to download, and select which state to query.

## The Data Loader

Subscribers and trial accounts can now create unique address level datasets to share with others and overlay on top of PolicyMap's thousands of data layers. There are two ways to create a dataset; by adding individual sites or uploading a spreadsheet of data.

To get started, select Data Loader from the top menu. This will begin your process for creating a dataset. There are a series of steps to initially setup a dataset.

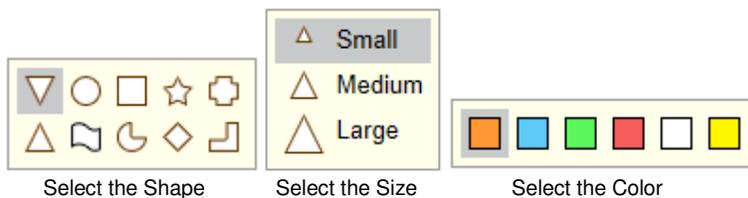
### For Adding Individual Sites:

- 1) **Method to Load Data:** Select "Add Sites Directly to Map".
- 2) **Name of Dataset:** Enter the name of your dataset.
- 3) **Share with:** Select how you would like to share this data:
  - **Myself Only** – Available to only your account.
  - **Public** – Available for all users to access from the Add Sites menu, be sure to select the correct category. Please note: *PolicyMap reserves the right to remove any data deemed inappropriate or contact the subscriber if a dataset name causes confusion among users.*
  - **Individual User** – Share the dataset to specific people by entering their email address. Please enter one email address per entry box.
- 4) **Icon:** Choose a custom shape, size, or color for the icons to represent your data. This allows users to create multiple datasets with different icons and colors, each could represent a unique characteristic in the dataset. This customization is similar to the "filtering" option with our premium subscription datasets.

The screenshot shows the 'Data Loader' interface with two main buttons at the top: 'Create New Dataset' and 'Access / Edit My Datasets'. Below these are four numbered steps:

- 1. Method to Load Data:** Two radio buttons are shown: 'Add Points Directly to Map' (selected) and 'Upload Spreadsheet of Points'.
- 2. Name of Dataset:** A text input field contains 'The Reinvestment Fund Loans' with a character count '(23 characters remaining)' below it.
- 3. (-) Share with:** Three radio buttons are shown: 'Myself Only' (selected), 'General public', and 'Select individuals'.
- 4. Icon:** Three links are shown: 'Shape', 'Size', and 'Color', each with a small colored circle next to it.

At the bottom right of the interface is an orange button labeled 'Begin Adding Points >>'.



The screenshot shows a form titled 'Enter Address for Site' with the following fields:

- Address: [Text input field]
- City: [Text input field]
- State: [Text input field]
- Zip Code: [Text input field]

At the bottom of the form are two orange buttons: 'Find' and 'Cancel'.

Once you have setup your dataset, click on [Begin Adding Sites >>](#) to start adding addresses to your dataset.

Just like the Maps page, you can start by using the Set Location bar to zoom into a neighborhood. To add an address, use the [Enter Address For Site](#) button, which will locate your address and drop an icon at the location or to simply click anywhere on the map.

After finding a site or adding a site by selecting a point on the map, you can customize each site with the following options:

- All locations must have a title
- The description box is an open text box that allows you to add as much information as you would like for the site.
- Additionally, you can add an image for the site. Images are not hosted on PolicyMap, so you should link the location of an image into the Image box. You will get an error if the image link is incorrect.

The screenshot shows a form for customizing a site with the following fields:

- Title: [Text input field containing 'PolicyMap']
- Description: [Text area containing '1700 Market St, Philadelphia, PA 19103. Come visit our new offices']
- Image: [Text input field containing 'http://www.policymap.com/images']

At the bottom of the form are two orange buttons: 'Save' and 'Cancel'.

Repeat this for all addresses or points you want to add to the dataset. All locations added to the dataset will be shown on the left side of the map

At any time, you can edit a location by selecting the icon or delete a location with the icon. When you are done adding sites to your dataset, select [Save](#)

Users can create a new dataset at any time by selecting the Create New Dataset tab on top, or edit a saved dataset.

[Create New Dataset](#) [Access / Edit My Datasets](#)

[<< Return to List of Datasets](#)

Name of Dataset:  
  
(36 characters remaining)

(-) Share with:  
 Myself Only  
 General public  
 Select individuals

Icon:  Shape [Size](#) [Color](#)

[Load Dataset on Maps Page](#)

[Delete Dataset](#) [Download Points](#) [Save](#)

(-) Points:

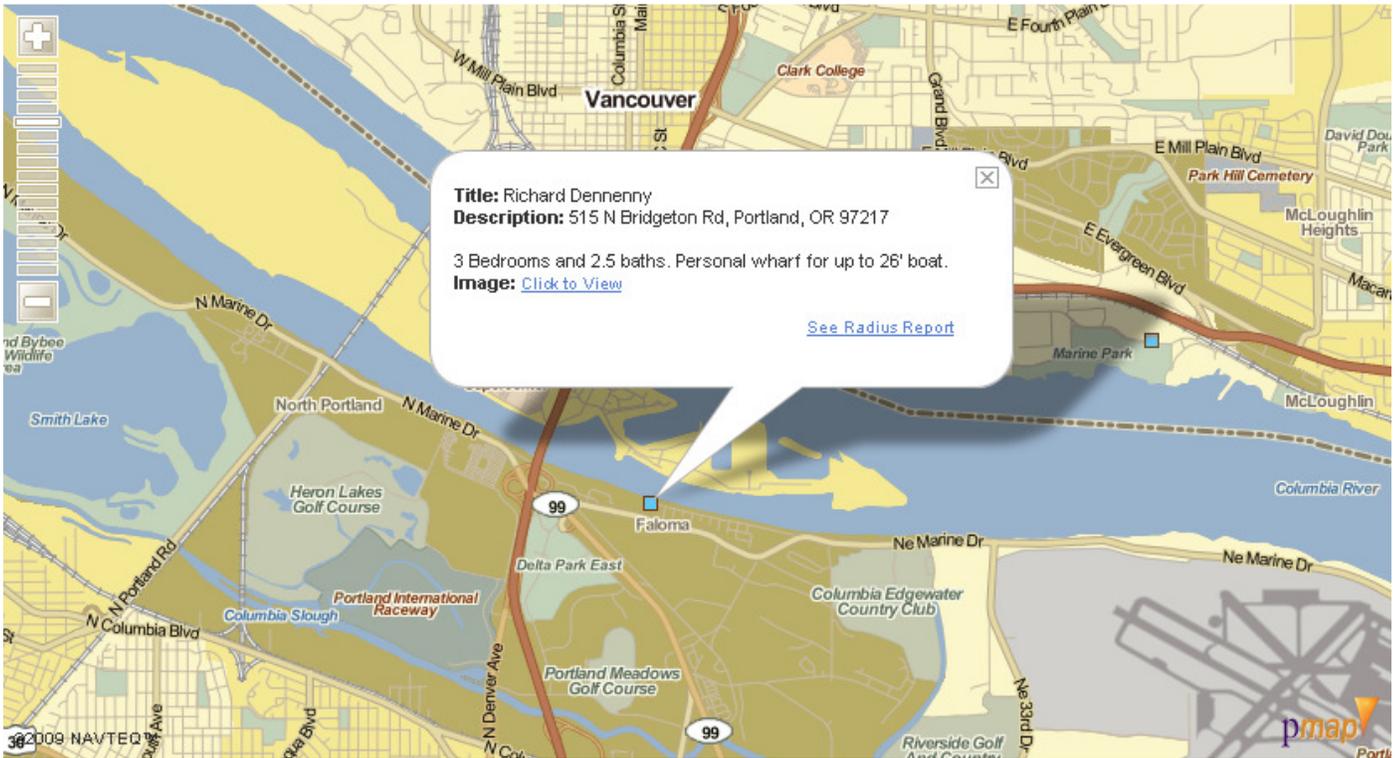
- Ed Debevic's**  
Very lively entertainment. The staff experience is very unique, so beware.  
Image: <http://a4.urbandcn.com/w/s/vH/L1m51czpLaCK4U.jpg>
- Mansion**  
It's the Michael's of Chicago!

The Access/Edit My Datasets tab will display all previously created datasets. When you select the tab, you can click the "pencil" icon or the dataset name to open and begin editing an existing dataset. In editing, you have the same functions as you did when first creating a dataset; you can change the name, how the dataset is shared, add or remove sites, edit existing sites, or download the data and list of all the sites into a spreadsheet.

To load your datasets on the Maps or Analytics page, we've added a few new menus in the Add Sites section. My Sites will show all of the datasets you have created. My Sites will also include datasets that have been shared with your account from another user. Subscriber-published Sites underneath are datasets that other have chosen to share with the public as well as datasets that have been process by our team for subscribers. All datasets will show the person that created it and when it was created.

With your dataset(s) loaded, you can click onto each site and view all data. If the location has an image attached to it, you can select the Click to View link to open.

You can edit a datasets from the Maps or Analytics page by selecting the "pencil" icon. This will take you to the Upload/Edit Data tab with your dataset already loaded for editing.

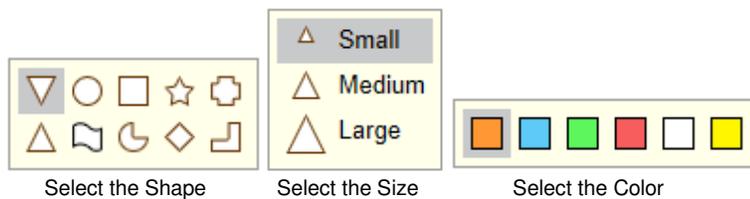


## For Uploading a Spreadsheet of Data:

Be sure to read our tips on setting up your CSV data file for use in uploading, found here (<https://www.policymap.com/blog/?p=9569>). We know that all files can be different and all users will have a different way of storing data. Our tips are to help make sure your data files process and load easily.

With your data file setup correctly and saved as a CSV file, you are ready to use the Data Loader. Log into your PolicyMap account and select Data Loader in the upper left.

- 1) **Method to Load Data:** Select "Upload Spreadsheet of Sites".
- 2) **Name of Dataset:** Enter the name of your dataset.
- 3) **Share with:** Select how you would like to share this data:
  - **Myself Only** – Available to only your account.
  - **Public** – Available for all users to access from the Add Sites menu, be sure to select the correct category. Please note: *PolicyMap reserves the right to remove any data deemed inappropriate or contact the subscriber if a dataset name causes confusion among users.*
  - **Individual User** – Share the dataset to specific people by entering their email address. Please enter one email address per entry box.
- 4) **Icon:** Choose a custom shape, size, or color for the icons to represent your data. This allows users to create multiple datasets with different icons and colors, each could represent a unique characteristic in the dataset. This customization is similar to the "filtering" option with our premium subscription datasets.



- 5) **Import CSV File:** Finally, browse for the file to upload.
  - Be sure to visit the Data Loader webpage to learn more about the tool, including tips on how to setup your data file, common warning messages when uploading data and ways to resolve the warning. (<http://www.policymap.com/data-loader.html>)

The screenshot shows the "Create New Dataset" form. At the top are two buttons: "Create New Dataset" and "Access / Edit My Datasets". The form is divided into five sections:

- 1. Method to Load Data:** Two radio buttons: "Add Sites Directly to Map" (unselected) and "Upload Spreadsheet of Sites" (selected).
- 2. Name of Dataset:** A text input field containing "The Reinvestment Fund Loans" with a "(23 characters remaining)" note below it.
- 3. (-) Share with:** Three radio buttons: "Myself Only" (selected), "Public" (unselected), and "Individual Users" (unselected).
- 4. Icon:** A red circle icon followed by three links: "Shape", "Size", and "Color".
- 5. Import CSV File:** A text input field followed by a "Browse" button.

At the bottom, there is a link: "Click here to see helpful tips for uploading your data: [Spreadsheet Tips](#) | [Sample Spreadsheet](#)".

After selecting the **Import Spreadsheet >>** button, you will open the Import Sites page:

Import Sites

Confirm that these columns contain the information to locate an address. Use the "remaining columns" section to find missing or mislabeled data types.

Column Name:	Data Type:	and / or	Column Name:	Data Type:
Address	Address 1		Latitude	Latitude
City	City		Longitude	Longitude
State	State			
Zipcode	Zip Code			

---

Confirm the types for the remaining columns:

Column Name:	Data Type:	\$	%
TRFProgram	Text	<input type="radio"/>	<input type="radio"/>
ProjectType	Text	<input type="radio"/>	<input type="radio"/>
Customer	Text	<input type="radio"/>	<input type="radio"/>
TransactionNumber	Number	<input type="radio"/>	<input type="radio"/>
Loan ROI	Number	<input type="radio"/>	<input checked="" type="radio"/>
ClosingDate	Text	<input type="radio"/>	<input type="radio"/>
TransactionAmount	Number	<input checked="" type="radio"/>	<input type="radio"/>
TransactionAmtAddress	Number	<input checked="" type="radio"/>	<input type="radio"/>

Delete Sites and Reimport

Next >>

Data Type:

- Address 1
- Text
- Number
- Image URL
- Address 1
- Address 2
- City
- State
- Zip Code
- Latitude
- Longitude

The Import Sites page will display the column names from your spreadsheet. The top section identifies the columns which will be used to geocode (locate) an address.

The geocoder will use the following combination to successfully locate an address: **Latitude & Longitude OR Address 1 & Zip Code; Address 1, City, & State**. Use the drop down menus for Data Type to identify the Address 1, City, State, Zip Code, or Latitude and Longitude from your dataset. If the incorrect column name is being used to geocode an address, be sure to check the "remaining columns" list below; find and select the Data Type for the correct column.

If you do not see all your fields in the Import Sites page or missing required Data Types to geocode an address, select the **Delete Sites and Reimport** button to exit the Import Sites page. Re-check your data file to make sure it has the correct labels for each column and check the [Spreadsheet Tips](http://www.policymap.com/blog/?p=9569) page.

The Import Sites page also allows you to identify if a data column represents a currency or percentage. The data loader will initially attempt to identify columns which have only numerical values and then set the Data Type to "number." Select the **\$** or **%** radio buttons if the corresponding column represents that type of data.

When you have identified the columns for geocoding and set the data types for each column, select **Next** to start geocoding.

Column Name:	Data Type:	\$	%
TRFProgram	Text	<input type="radio"/>	<input type="radio"/>
ProjectType	Text	<input type="radio"/>	<input type="radio"/>
Customer	Text	<input type="radio"/>	<input type="radio"/>
TransactionNumber	Number	<input type="radio"/>	<input type="radio"/>
Loan ROI	Number	<input type="radio"/>	<input checked="" type="radio"/>
ClosingDate	Text	<input type="radio"/>	<input type="radio"/>
TransactionAmount	Number	<input checked="" type="radio"/>	<input type="radio"/>
TransactionAmtAddress	Number	<input checked="" type="radio"/>	<input type="radio"/>

After the Data Loader has geocoded your addresses, the Add/Edit Sites window will open and display a table of all addresses and the data for each address. You can edit any field for an address, add or remove addresses, set unique features, and see results of the geocoding process.

Add / Edit Points
Set Access to Fields

**The Reinvestment Fund Loans (Shared with myself only)**

- Result: 98 of 100 points successfully geocoded.
- Click within an address field to manually edit address information. The system will automatically re-geocode updated address fields.
- To sort your data, click on any of the column headers.

Select field for label to display (optional): [None]

Geo-coded	Row	Latitude	Longitude	TRF Program	Project Type	NMTC Status	Loan Type	Customer	Address	City	State	Zipcode	Transacti Number
●	2			Housing	Housing	Non-NMTC	Acquisition	Westrum Urban Opportunity		Philadelphia	PA	19145	29000480
●	3	40.360...	-76.456...	Housing	Housing	Non-NMTC	Other	Deer Lake Associates	2075 Water St	Lebanon	PA	17046	20100510
●	4	40.037...	-75.176...	Housing	Housing	Non-NMTC	Other	CIP Housing, LP	22 W Rittenhouse St	Philadelphia	PA	19144	20100570
●	5	40.431...	-79.958...	Workforce Grant	Job Training	Non-NMTC	Other	Brightside Academy	45 Bates St	Pittsburgh	PA	15213	500001
●	6			Workforce Grant	Job Training		Other	Brown's Super Stores		Philadelphia	PA	19153	500022
●	7	39.957...	-75.229...	Housing	Housing	Non-NMTC	Acquisition/construction	Neighborhood Restorations	5410 Walnut St	Philadelphia	PA	19139	20100300
●	8	39.957...	-75.229...	Housing	Other	Non-NMTC	Acquisition/construction	Neighborhood Restorations	5410 Walnut St	Philadelphia	PA	19139	20100300
●	9	39.952...	-75.227...	Housing	Other	Non-NMTC	Acquisition/construction	Neighborhood Restorations	5218 Addison St	Philadelphia	PA	19143	20100300
●	10	39.956...	-75.233...	Housing	Other	Non-NMTC	Acquisition/construction	Neighborhood Restorations	249 S 56th St	Philadelphia	PA	19139	20100300
●	11	39.959...	-75.238...	Housing	Other	Non-NMTC	Acquisition/construction	Neighborhood Restorations	5248 Cedar St	Philadelphia	PA	19143	20100300

Delete Points and Reimport
Download Points
Save
Save & Close

Add / Edit Sites
Set Access to Fields

**Investment Locations for TRF (Shared with myself only)**

- Result: 47 of 50 sites successfully geocoded.
- Click within an address field to manually edit address information. The system will automatically re-geocode updated address fields.
- To sort your data, click on any of the column headers.

Select field for label to display (optional): [None]

The top left section will give you the results of the geocoding process. **Please note, here at PolicyMap, we customarily return a 75%-80% match rate when geocoding addresses.** The section will also give you great tips on how to interact with the table below.

The top right section gives users optional features for search and display. The first will give users the ability to display a label above each icon on the map. Select which data field from the drop down menu. Due to usability and performance, this feature is only available for datasets with 250 addresses or less. The second option turns on the ability to search for an address. Simply select which column of data to search by.

Select field for label to display (optional): NAME

The first four columns in the table are default from PolicyMap:

- **Geocoded** – Each color will confirm if the address was successfully geocoded;  (green) means the address was found  (red) means the address failed to be found during geocoding.
- **Row** – This will show the order that each address was imported into the Data Loader
- **Latitude & Longitude** – These are the coordinates that were found for a successfully geocoded address

Add / Edit Points
Set Access to Fields

**The Reinvestment Fund Loans (Shared with myself only)**

- Result: 98 of 100 points successfully geocoded.
- Click within an address field to manually edit address information. The system will automatically re-geocode updated address fields.
- To sort your data, click on any of the column headers.

Select field for label to display (optional): [None]

Geo-coded	Row	Latitude <small>Latitude</small>	Longitude <small>Longitude</small>	TRF Program <small>Text</small>	Project Type <small>Text</small>	NMTC Status <small>Text</small>	Loan Type <small>Text</small>	Customer <small>Text</small>	Address <small>Address 1</small>	City <small>City</small>	State <small>State</small>	Zipcode <small>Zip</small>	Transacti <small>Number</small>
	2			Housing	Housing	Non-NMTC	Acquisition	Westrum Urban Opportunity		Philadelphia	PA	19145	2900048
	3	40.360...	-76.456...	Housing	Housing	Non-NMTC	Other	Deer Lake Associates	2075 Water St	Lebanon	PA	17046	2010051

Column headers can be selected to re-sort, normally in alphabetical or numerical order; the default sort is by Row. All text boxes (except for column headers and latitudes and longitudes) can be edited. Selecting the text will release the field and allow you to edit. *The ability to re-sort a column and edit text, together can be very helpful for addresses which were not successfully geocoded. Simply sort by the Geocoded column to display all unsuccessful address first, and then click into the address field for each row to enter missing addresses, remove address information that could cause the failure (e.g. Apt #, PO Box, etc.), or change the city, state, or zip code.*

Loan Number	Loan ROI Number (%)	Closing Date
00	0.1	5/25/2001

0.01 0.001

Columns which represent percentage values will have to option to increase or decrease the decimal by a factor of two. Click the corresponding button to move the decimal.

The last column for any row will allow you to delete a row. Simply select the close  button.

At the bottom of the Add/Edit Sites table, users will have a variety of functions, including:

Add Row

Delete Sites and Reimport
Download Sites
Save
Save & Close

- **Add Row** – This will add an additional row for an address to the table.
- **Delete Sites and Reimport** – This is only available for newly created dataset and will allow you to delete the current dataset to re-upload another file. This is helpful if; columns are not in the correct order, headers are labeled wrong, data in the tables are incorrect, or you want to adjust your data file before saving. Once you save the dataset, this button will not be available.
- **Download Sites** – Users can download the current dataset in the table. This will include the latitude and longitude for any successfully geocoded address.
- **Save** – Saving will save any edits and settings during the session.
- **Save & Close** – This will save any the session and close the Add/Edit Sites page. Taking you back to the initial Data Loader page.

The **Set Access to Fields** tab allows you to select which fields are visible when viewing an address on the Maps or Tables page. By default, all fields are available to all users and yourself. Simply check off which fields you wish to share. Select **All** to check or uncheck all fields in a column. The *Display for Public* or *Display for Individual Users* columns are only accessible if that sharing option was selected during the setup of the dataset. You can also update the viewing options at any time. Please note; any changes to how the dataset is shared on the setup page will reset all fields in the Set Access to Field page.

Add / Edit Sites

Set Access to Fields

### The Reinvestment Fund Loans (Shared with individual users)

Select the fields that will appear in the info bubble for each user category.

Allow individual users permission to download this dataset

Field	Display for Myself?	Display for Public?	Display for Individual Users?
Latitude	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Longitude	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TRFProgram	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ProjectType	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

On the top right, users have the option to allow the dataset to be downloadable. This option ties into the share fields function on the tab, so whichever fields are marked to share will be the only fields downloaded.

Allow individual users permission to download this dataset

When you are finally done with editing and customizing your dataset, select the **Save & Close** button on the bottom. This will close the Add/Edit Sites page and return you to the setup page. The interactive map on the right will show all geocoded address. Users can click onto an icon to see all the shared data for a site.

**Create New Dataset** | **Access / Edit My Datasets**

**1. Method to Load Data:**

Add Sites Directly to Map  
 Upload Spreadsheet of Sites

**2. Name of Dataset:**

The Reinvestment Fund Loans  
(23 characters remaining)

**3. (-) Share with:**

Myself Only  
 Public  
 Individual Users

Enter one email per box. Select "Add a new email address" to add additional users.

phil.vu@policymap.com  
[Add a new email address](#)

**4. Icon:**  Shape  Size  Color

[Load Dataset on Maps Page](#) | [Edit Sites >>](#)  
[Delete Dataset](#) | [Download Sites](#) | [Save](#)

Users can make additional edits and customization to the dataset including; changing the name of the dataset, how/who the dataset is shared with, or the icon type, color, and size. The "Edit Sites" button will re-open the Add/Edits Sites page, allowing users to make edits to the current dataset or add additional address. The "Load Dataset on Maps Page" will open the dataset onto the Maps page giving users the ability to use all the unique features and data layers on PolicyMap with the dataset.

[Load Dataset on Maps Page](#) | [Edit Sites >>](#)  
[Delete Dataset](#) | [Download Sites](#) | [Save](#)

## Widgets

Widgets are customizable instances of PolicyMap maps with dynamic features such as the ability to zoom into or pan across a map, click on an area to view the underlying data or toggle between additional data layers and points of data. Communicate with visitors to your website with a powerful interactive display of data relevant to your organization's work. Widgets can be purchased separately or come bundled with a Premium subscription.

**Creating a Widget** – Widgets are simple to create. Just send the following items below to [pmap@policymap.com](mailto:pmap@policymap.com) and we'll let our team build the tool for you.

1. Choose a location – You can have your map center to any location in the country by default or have the map start at the national level. Have your visitors start at a map of a census tract, zip code, city, county, MSA or any pre-defined location in PolicyMap.
2. Select up to 15 data layers – What data you want to show your visitors? Choose up to 15 data layers for your website from the hundreds available on PolicyMap ([www.policymap.com/data/our-data/](http://www.policymap.com/data/our-data/)). (Note: Only public data can be made available on your public website.)
3. Additional optional default settings for the maps
  - a. Pick a default data layer – From the data layers you have chosen, select the default data layer that your visitors will initially view. Customize the layer as needed.
  - b. Set the default Year or Variable – If the data layer has multiple time periods, you can choose which period to show as the default. You can also show the number (#) or count related to a data layer, the median (\$) value, or the percent (%) of the data layer as the default variable.
  - c. Set the number of ranges or color ramp – Choose from the three (3) different color ramps to use in the widget, and select the number of ranges the default data layer can display.
  - d. Show what geography the data is shaded by – Depending on the location and data layer you've selected as default, the data will shade automatically at a pre-defined geography. You can change this and select a different "shade-by".
  - e. Make custom ranges for each data layer – Customize data layers on the widget by creating custom ranges. Custom ranges will be locked for all zoom levels of the data layer.
4. Select up to five (5) point datasets. Add point data (addresses) from Add Sites and give your visitors a chance to see address level datasets on top of thematic maps. Choose from any of our publicly available points ([www.policymap.com/data/our-data/](http://www.policymap.com/data/our-data/)) and set filters just like on PolicyMap. Premium subscribers can also send us their data for upload. One of these point datasets can appear on your widget by default.
5. Opt to add one (1) pre-defined boundary layer – Boundary layers include zip codes, congressional districts, etc. and depending on what you want to show your visitors, can give your maps more relevance and meaning.
6. Additional Options:
  - a. Set Location Bar – Include a search bar so users can navigate to anywhere in the US
  - b. Print Option – Give users the ability to create a JPEG printout of the map
  - c. Rankings – Display the ranking of a selected geography for the given data layer

**Example** – See some examples of how users are utilizing PolicyMap widgets on their websites:

- IFF - [http://www.iff.org/content.cfm/chicago\\_map](http://www.iff.org/content.cfm/chicago_map) and
- Foreclosure-Response.org - [www.foreclosure-response.org/maps\\_and\\_data/lisc\\_maps.html](http://www.foreclosure-response.org/maps_and_data/lisc_maps.html).

**Customizing a Widget** – Each widget is completely customized to our users’ needs. Users can decide the default location, type of datasets to display, and boundaries to overlay. Within the URL of the PolicyMap widget, there are commands which allow some basic customization of the widget, and outside the URL are customizations for the frame of the widget. Some of these customizations are only available if the widget was originally designed to have the feature.

Within the `<iframe ...> </iframe>` but outside the URL will customize the framework which contains the map (see highlighted area below). These customizations are similar to HTML options.

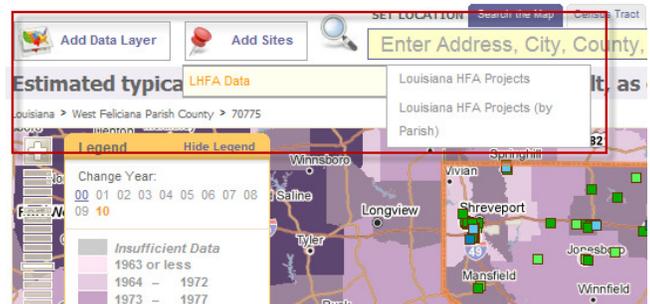
```
<iframe src="http://www.policymap.com/widget.jsp?userid=892&wid=4&height=500&i=9841103&btd=4&search=true&nomenus=true" width="100%" height="700px" scrolling="no" marginwidth="0" marginheight="0" frameborder="0" name="PolicyMap"></iframe>
```

- width="value" – The width of the frame that contains the widget. Values can be in percentages or pixels
- height="value/px" – The height of the frame that contains the widget. Values can be in percentages or pixels (Note: the "height=" should be greater than the "&height" inside the URL)
- scrolling="value" – Choose yes or no to add vertical and horizontal scroll bars around the widget
- marginwidth="0" – Side margins between the map and frame
- marginheight="0" – Top and bottom margins between the map and frame
- frameborder="0" – You can add a border around the entire frame
- name="PolicyMap" – Give a widget a customized title

Also within the `<iframe ...> </iframe>`, by adding these options to the URL (see highlighted area below) will customize the widget interface:

```
<iframe src="http://www.policymap.com/widget.jsp?userid=892&wid=4&height=500&i=9841103&btd=4&search=true&nomenus=true" width="100%" height="700px" scrolling="no" marginwidth="0" marginheight="0" frameborder="0" name="PolicyMap"></iframe>
```

- &altLayout=true – Moves the Add Data Layer and Add Sites menu above the map. This is one of the most unique customizations to the widget, which gives an alternative view of the widget. In the example on the right, the option to Add Data Layer and Add Sites are now next to the Set Location bar.
- &state=XX, or &state=XX&county=XX, or &state=XX&city=XX – Allows any widget that does not have a default geography to center to a state, county, or city. For states, enter the two (2) digit state abbreviation. For counties or cities that have more than one word, use the HTML code for a space (%20) between the words.
- &hideleg=true – Hide the legend as a default
- &nomenus=true – Remove Add Data Layer and Add Sites from the widget
- &search=true – Add a search function onto a widget (**Please note that if your width is less than 770px, the Set Location bar will resize to a simple search bar without options for searching by pre-define geographies like census tract, school districts, metro areas, etc.**)
- &nobounds=true – If a widget starts at a certain location on the map, add this to show the boundary for the starting location
- &hideimenu=true – Hides the indicator menu
- &hidepmenu=true – Hides the points menu
- &mlon=true – Makes the map layer on as default
- &ranking=true – Adds the ability to show the ranking of a location selected on the map



Add these options with a value to the URL will further customize the widget

- &nb=value – Values from 2 to 8 are accepted. This sets the number of breaks used for the thematic data.
- &rpm=color ramp – Changes the thematic colors. When this parameter isn't set, it uses the default purple colors. The options available for color ramps are: =blue and =olive.
- &height=value – The height of the map in pixels, cannot be in percentages (Note: the "&height" should be less than the "height=" outside the URL).
- &rstyle=value – Values from 1 – 3 are accepted. Changes the different styling for the rankings feature. Default style and color are shown if code is not added.

## My Saved Work

My Saved Work stores all your saved work throughout PolicyMap. Uniquely, saved work for maps, tables, reports, and 3-Layer maps will save the data from the time of creation. These will allow you to capture the data for that period. This feature is only available to registered users and subscribers. Registration is free. When you open the My Saved Work page, each category of saved items is collapsed and just needs to be individually loaded.

MAPS TABLES REPORTS 3-LAYER MAPS DATA LOADER

POLICYMAP

Phil - Premium Edition

My Saved Work - Access your saved work

Maps

Tables

Tables Lists

Reports

3-Layer Maps

Custom Regions

Saved Datasets

Shared Datasets

Downloaded Data

There are currently no saved Tables Lists found.

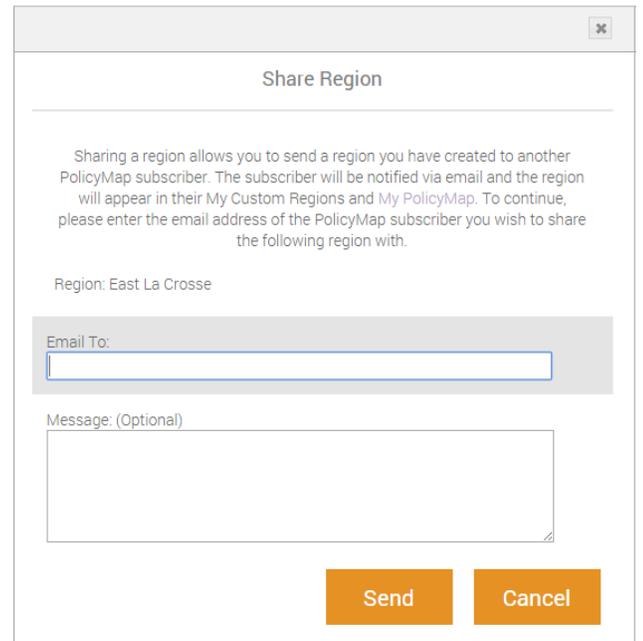
Once a section is selected, you will see a list with three (3) unique columns; Created, Name, and Actions. The Created and Name columns can be resorted; Created is resorted by date and Name is resorted in alphabetical order.

The last column has icons for specific uses;

-  The open icon will reopen the saved item, including zooming the map to the save location and loading any datasets. Selecting the name will also reopen the saved item.
-  The pencil icon will give users the ability to rename the title of the save item. This will open a popup window and a text field to enter/edit the name.
-  The download icon will only appear if a saved item has an item to download. Mouse over the icon and a menu will appear with the file types which were selected to print.
-  The trashcan icon will give users the ability to delete a saved item. A warning will always appear to confirm the deletion.

**Custom Regions** will have an extra column which will display the author of the custom region and new icon that replaces the download icon

-  The open icon will reopen the custom region zoomed to the area which the custom region fills in.
-  The share icon allows a user to share a saved custom region to another subscriber. Select the icon to open a popup with the ability to enter an email address and short message.



The image shows a 'Share Region' popup window. At the top, it says 'Share Region'. Below that, there is a paragraph explaining that sharing a region allows sending it to another PolicyMap subscriber via email. The region name 'East La Crosse' is displayed. There is an 'Email To:' text box and a 'Message: (Optional)' text area. At the bottom right, there are 'Send' and 'Cancel' buttons.

**Downloaded Data** are saved downloads done through the [Download Data](#) function. Users will download these queries as CSV (Comma Separated Values) files that can be opened in excel. The download icon will show CSV.

The name column will identify where each dataset was created:

- Maps Data
- Tables Data
- 3-Layer Maps – this will also label what type of data
  - List are places or geographies
  - Points are addresses

**Saved and Shared Datasets** are datasets created or shared using the Data Loader. Each dataset name will list how many points/addresses are in each dataset and Shared datasets will list the name of the author of the dataset.

Opening the saved/shared dataset will give users the option to open in the Maps, Tables, or 3-Layers Maps pages.