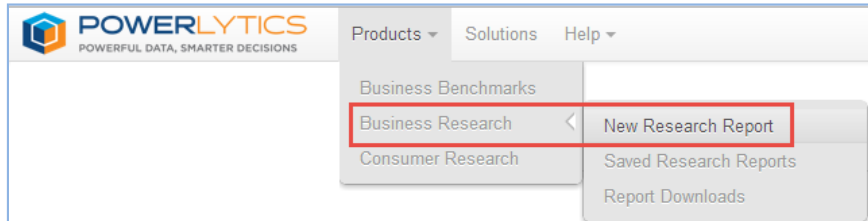


Quick Start Guide – Creating a New Research Report

The following steps detail how to create a Business Research report.

1. Under Products on the top menu bar select Business Research – New Research Report. Before a report can be saved or submitted all field selections must be complete.



2. Enter a report title and description.

Create Research Report

Create and run a research report

Benchmark Selection

Report Title [?]

Report Description [?]

3. Research Report Settings – Select Statement Type, Report Output Format and set Automatic De-suppression if desired. De-suppression automatically resets the query across the Industry, Geography and Size dimensions to help ensure a rich report is returned. Dimension priority sets which Dimension is the most important, labeled as 1, and should be suppressed only after the other lower (2) priorities have been suppressed. See example included in the Appendix.

- Research Report Settings

Statement Type [?]

Financial Statement
 Tax Return

Report Output Format [?]

Vertical
 Horizontal

Automatic De-suppression/roll up [?]

On
 Off

Income Statement [?]

Select one or more boxes below...

Include income statement data in this research report.

Balance Sheet [?]

Include balance sheet data in this research report.

Ratios [?]

Include ratio data in this research report.

Maximum Suppression [?] %

Dimension Priority [?]

1. 2. 3.

Dimensions will be de-suppressed/preserved in this order. Lesser ranked dimensions will be rolled up first.

4. Company Legal Form of Organization and Selection:

- Select Corporations, Partnerships, Sole Proprietorships or Corporations & Partnerships.

- Company Legal Form of Organization

Company Legal Form [?]
of Organization Corporations and partnerships ▼

Select one company type.

- Select Company or Individual Location Level (establishments). Company level selection will show only company operations related to the region selected. *Example: If Northeast region is selected, national companies will have only their operating activity for the Northeast region displayed.* If Individual Location is selected, the average operations that relate to a single store, that fit the other filters, will be displayed. *Example: If an individual location is selected, a comparison of an individual retail store can be made against the average performance of similar stores.*

Company / Individual [?]
Location Level Individual location ▼

5. Employment or Sales Range – Select Sales or Employment and corresponding range. Select “Include non-employers” if needed. Size Range data will be aggregated unless the ‘Provide Individual Data for the Selected Item(s)’ box is selected.

- Employment or Sales Range

Size Range Filter [?] Sales ▼

Select the size range filter method.

Include [?]

nonemployers A nonemployer business is one that has no paid employees. Most nonemployers are self-employed individuals operating very small unincorporated businesses, which may or may not be the owner's principal source of income.

Provide Individual [?]

Data for the Selected Item(s) Check this to vary the data by each of the selected items. Uncheck to provide combined data results.

Sales Range [?]

\$0-200K

\$200-500K

\$500K-1M

\$1-5M

\$5-10M

\$10-25M

\$25-50M

\$50-100M

Select at least one sales range.

Select All

6. Report Year Range - Select a start year and an end year for the report.

- Report Year Range

Start Year [?]

2013 ▼

Select the starting year for this report

End Year [?]

2013 ▼

Select the ending year for this report

7. Geographic Region – Select U.S., Census Region (i.e. Northeast) or Metropolitan Area and filter and output detail. Geographic data will be aggregated unless the ‘Provide Individual Data for the Selected Item(s)’ box is selected. If Company Level is selected in step 4b, the geographic region is set to entire U.S.

- Geographic Region

Geographic Filter [?] Census Region
Select the geographic filter method.

Report Output Detail [?] County
Select the level of geographic detail

Census Region [?]

Northeast Region

Midwest Region

South Region

West Region

Select one or more Census regions.

Select All

Census Divisions [?]

Northeast Region

New England Division

Middle Atlantic Division

Select one or more Census divisions.

Select All

States [?]

Middle Atlantic Division

New Jersey

New York

Pennsylvania

Select one or more states.

Select All

Counties [?]

New Jersey

Atlantic County

Bergen County

Burlington County

Camden County

Cape May County

Cumberland County

Essex County

Select one or more counties.

Select All

Provide Individual [?] Data for the Selected Item(s)

Check this to vary the data by each of the selected items. Uncheck to provide combined data results.

8. Industry Selection – Select from the NAICS Level of Detail box (NAICS 2-NAICS 6) to establish how the report data will be aggregated. Choose from the 1,100+ categories available from the 2012 NAICS category data. Use the search box or manually browse categories to select industries for the research report.
 - Search – Use the search box to identify an industry by keyword or NAICS 2-6 digit code. Then click on a code to make the selection. Related categories will auto-populate the subsequent NAICS category list boxes for selection. Industry selections are cumulative so to change existing selections click the Check to Replace the Existing NAICS Selections check box and click a different category code.
 - Browse – Use the NAICS 2 list box to browse and manually select an industry. Then click on one or more NAICS 2 items. All child NAICS 3-6 items will be selected in the NAICS lists below. If a more granular NAICS category selection is desired, the NAICS lists can be filtered by selecting only the desired NAICS 3-6 categories in each NAICS list box.

Also note, Industry data will be aggregated unless the Provide Individual Data for the Selected Item(s) box is checked.

- Industry Selection

Report Output Detail [?]
 NAICS3
Select NAICS2, NAICS3, NAICS4, NAICS5 or NAICS6

Search NAICS [?]

Enter keyword or 2-6 digit code

Check to replace existing NAICS selections

Search Results [?]

31 Manufacturing
 311 Food Manufacturing
 312 Beverage and Tobacco Product Manufacturing
 315 Apparel Manufacturing
 316 Leather and Allied Product Manufacturing
 321 Wood Product Manufacturing
 322 Paper Manufacturing
 324 Petroleum and Coal Products Manufacturing
 325 Chemical Manufacturing
 326 Plastics and Rubber Products Manufacturing

Click on NAICS code to make selection

Or manually set industry selection

NAICS2

11 Agriculture, Forestry, Fishing and Hunting
 21 Mining, Quarrying, and Oil and Gas Extraction
 22 Utilities
 23 Construction
31-33 Manufacturing
 42 Wholesale Trade
 44-45 Retail Trade
 48-49 Transportation and Warehousing

Select at least one NAICS2 Industry Classification.

NAICS3

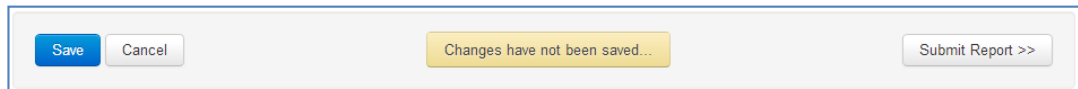
Beverage and Tobacco Product Manufacturing
 Textile Mills
 Textile Product Mills
 Apparel Manufacturing
 Leather and Allied Product Manufacturing
Wood Product Manufacturing
 Paper Manufacturing
 Printing and Related Support Activities

Select at least one NAICS3 Industry Classification.

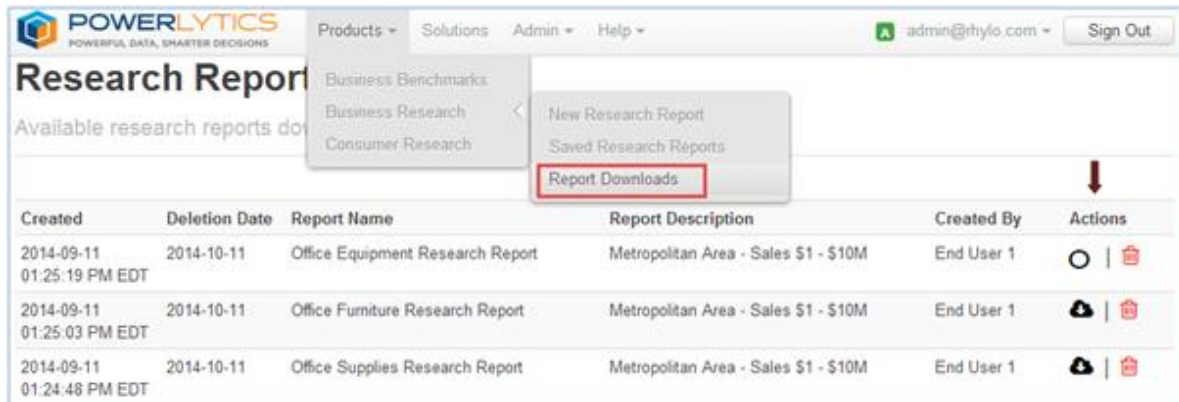
Provide Individual [?]
 Data for the Selected Item(s)
Check this to vary the data by each of the selected items. Uncheck to provide combined data results.

9. Save Selections and Submit Research Report request:

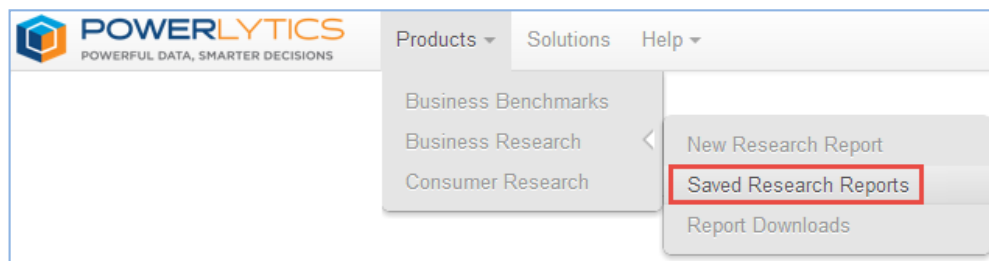
- Click the save button to save the selections. Before the report can be saved or submitted all fields selections must be complete.
- Click Submit Report to generate Research report based on selections. When the Research Report is complete a notification email including a link to access the report will be sent.



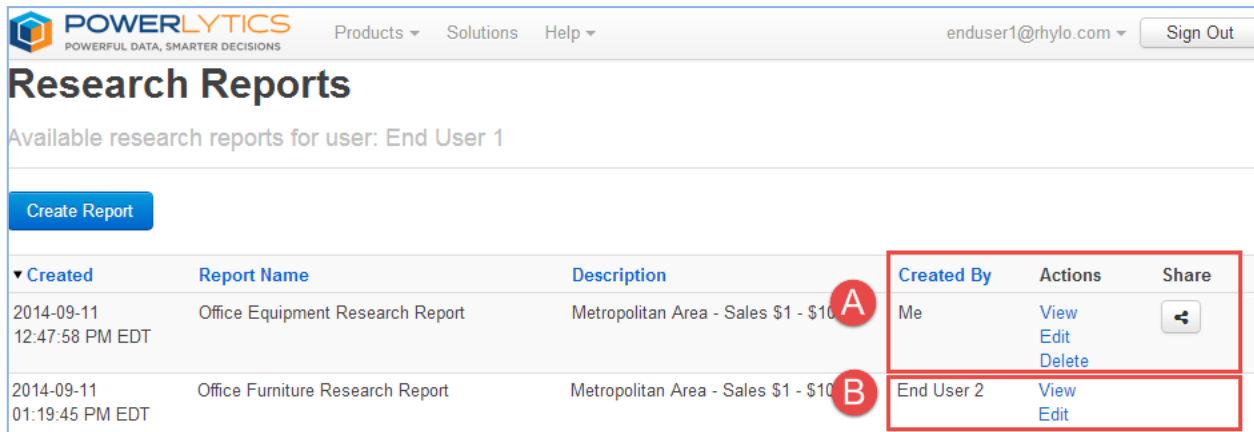
10. Download and check status of Research reports – Under Products on the top menu bar select Business Research – Report Downloads. Report processing time is dependent on the size of dataset and the overall number of queries. The download will be a .ZIP file including .CSV files for each section of the report, income statement, balance sheet and/or ratios. Report results with less than 4 companies are not available due to confidentiality guidelines and will be labeled No Results in the Actions column. To include additional companies, edit the report query to expand the parameters, and then resubmit the report. *Research report files will remain available to download for 30 days.*




11. Access and Edit Research report queries – Under Products on the top menu bar select Business Research – Saved Research Reports.




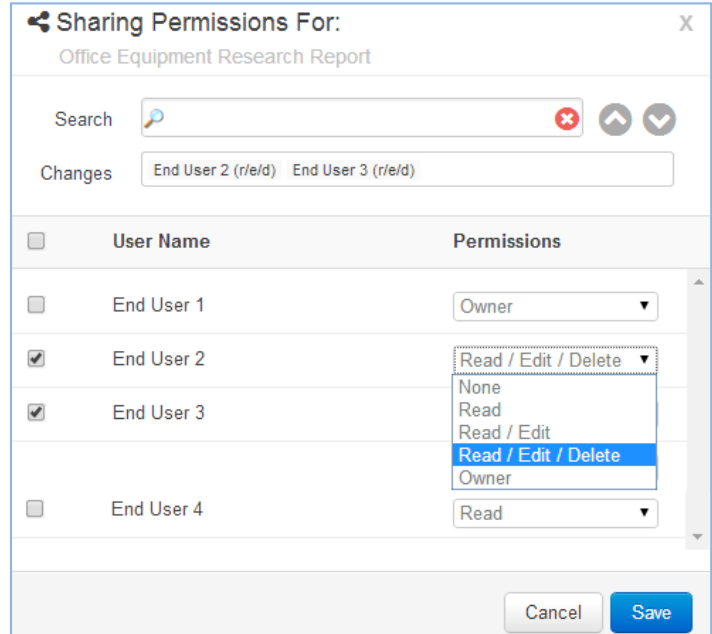
12. On the Business Research Reports page all research reports, created by or shared with the user, are available for review. The creator of the report is automatically assigned ownership permission which enables them to share the report with other users in the corporate account.



Created	Report Name	Description	Created By	Actions	Share
2014-09-11 12:47:58 PM EDT	Office Equipment Research Report	Metropolitan Area - Sales \$1 - \$10	Me	View Edit Delete	
2014-09-11 01:19:45 PM EDT	Office Furniture Research Report	Metropolitan Area - Sales \$1 - \$10	End User 2	View Edit	

- Actions** – These options are specific to each Business Research report. The user, who created the Business Research report, as well as all Administrators, has view, edit, delete and share options **A**. Business Research report Items, created by other users but shared with this user **B**, will be included in the list but may have limited Action options. The View Action option will open a read-only version for review, then using the Save As button the user can save a copy under a new name to own, edit and share. The Sharing Permissions Control detailed below, determines the Action options available for a Business Research report.
- Share** – A Business Research report owner can share a Business Research report with other users to allow or remove view (read), edit, delete and ownership permissions. A Business Research report can have more than one owner.

13. To share a Business Research Report, click the Share button  to view the Sharing Permissions Control.



The screenshot shows a dialog box titled "Sharing Permissions For: Office Equipment Research Report". It features a search bar, a "Changes" box containing "End User 2 (r/e/d)" and "End User 3 (r/e/d)", and a table of users with checkboxes and permission dropdown menus. A dropdown menu is open for "End User 2", showing options: None, Read, Read / Edit, Read / Edit / Delete (highlighted), and Owner. "Cancel" and "Save" buttons are at the bottom right.

<input type="checkbox"/>	User Name	Permissions
<input type="checkbox"/>	End User 1	Owner
<input checked="" type="checkbox"/>	End User 2	Read / Edit / Delete
<input checked="" type="checkbox"/>	End User 3	Read / Edit / Delete
<input type="checkbox"/>	End User 4	Read

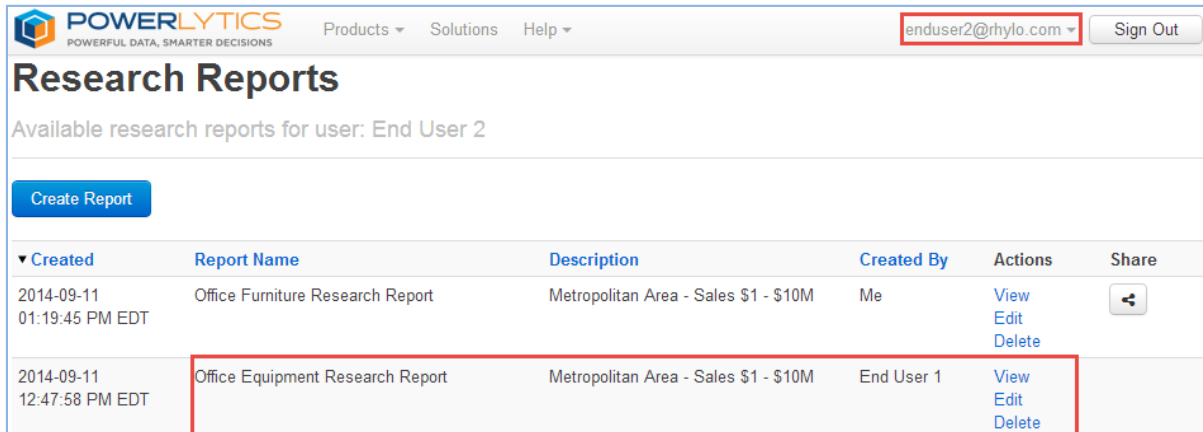
14. Search for a single user or select multiple users directly from the User Name list, and use the Permissions drop-down menu to set desired sharing privileges. **Permissions chosen for one user in the list will apply to all other users with the check box checked.** Use the arrow buttons to easily scroll through all available user names. As the permission is updated for each user, their name will appear in the Changes box with details of the change in parentheses. User names in the Changes box are clickable for quick navigation and permissions editing. Permissions are cumulative as follows:

- Owner = read (view), edit, delete and share permission and ability to assign additional owners
- Read/Edit/Delete = view, edit and delete permission only
- Read/Edit = view and edit permission only
- Read = view only permission
- None = the user cannot see or access the item

Example Above – End User 1 an owner of the Office Equipment Research report, and as such can set the sharing permissions for other users on their account. In the Changes box, *End User 2 (r/e/d)* shows that the end user now has read, edit and delete capabilities. Because End User 3 is also selected, the same permissions were automatically set. With this permission update, all changes End User 2 or End User 3 make to the Office Equipment Research report will be reflected on all other user accounts, such as End User 4, that have access to the Office Equipment Research report.

- 15. Click the Save button. The updated permissions to this Research Report will be reflected when a user signs in to the product or refreshes their Research Reports page.

Example Below – On the **End User 2** Business Research Reports page, the Actions column for the **Office Equipment Research report** now includes view (read), edit and delete.



POWERLYTICS
POWERFUL DATA, SMARTER DECISIONS


Products Solutions Help

enduser2@rhylo.com Sign Out

Research Reports

Available research reports for user: End User 2

Create Report

Created	Report Name	Description	Created By	Actions	Share
2014-09-11 01:19:45 PM EDT	Office Furniture Research Report	Metropolitan Area - Sales \$1 - \$10M	Me	View Edit Delete	
2014-09-11 12:47:58 PM EDT	Office Equipment Research Report	Metropolitan Area - Sales \$1 - \$10M	End User 1	View Edit Delete	

Appendix: De-Suppression Settings and Example Query**Automatic De-Suppression Settings**

On – Automatic de-suppression offers customized query suppression to ensure a report with rich data is delivered. For confidentiality reasons, the Business Research product suppresses data when there are less than 4 companies, based on the industry, geography and size parameters, returned. The de-suppression options set business rules to be activated when a query suppresses too much of the returned data. This feature sets both the overall suppression value, by percentage, and the prioritization, or importance, of the parameters. For example, if the most important parameter is staying in the zip code and the second most is the size range, then the industry could be increased from a NAICS 6 to a NAICS 5 to allow more companies to be included in the report.

Each parameter or dimension offers unique/relevant values that can be filtered as follows:

- Industry – NAICS 1 - NAICS 6
- Geography – U.S. - Zip Code
- Size – Various data bands for Employment (0-1000+employees) or Sales (\$0-1B+) ranges. Each range type can be reported in individual data bands or aggregated.

Suppression Value Examples:

20% Suppression = 80% yield (default)

60% Suppression = 40% yield

Off – When automatic de-suppression is turned off, a query with detailed parameters runs the risk of having a large percentage of records suppressed. Thus, for confidentiality requirements or lack of data, the report may have little depth and many variables will appear as NA.

De-suppression Example Query

Create a new research report and enable automatic de-suppression with 20% default maximum suppression level. Set Dimension Priority and corresponding filters as follows:

1. Industry - NAICS 6 - Sawmills (most important, highest priority)
2. Size - Sales Range \$0-5M, reported as Individual Data for the Items selected (data bands) in the drop down menu
3. Geography – Zip Code

Suppression/roll up within a Dimension - Beginning with the least important dimension, labeled as 3, the report query will apply the filter options selected from its drop-down menu in the report/query builder. If the desired suppression level is not reached, the filter is automatically aggregated or changed.

Example:

If Geography is the 3rd priority with the Geographic Region filter option set to Zip Code , and the desired suppression level is not reached, the filter will aggregate up through all the options, Zip Code, County, MSA, State, then aggregate to Census Region. If the desired suppression level is still not reached, all Geographic filter options are aggregated, and the query will be filtered at the U.S. level.

Suppression/roll up across 2 Dimensions - Once all the 3rd priority filter options have been attempted/aggregated the 2nd priority dimension will be applied to the query. The 2nd priority dimension will then be aggregated or changed as needed to reach the desired suppression.

Example Continued: The Geographic filter remains aggregated and the 2nd priority Size Range (sales range) of \$0-5M filter option is applied. The query will attempt to detail the individual sales range data bands of \$0-\$200K, \$200-500K, \$500K-1M, \$1-5M. If the desired suppression level is not reached, the Size filter will aggregate the \$0-\$5M as a single value, and the query will go back to the Geographic filter and move up through the options as needed, Zip Code, County, MSA, State, Census Region and finally the entire U.S.

If the desired suppression level is still not reached all Sales Range Sizes, \$0-1B+, will be aggregated and the query will again go back to the Geographic filter and move up through the options, Zip Code to entire U.S.

Suppression/roll up across all 3 Dimensions - After exhausting the 2nd priority, Size (sales range) and the 3rd priority Geography, both would remain aggregated, and the 1st priority dimension will be applied, aggregating or changing as necessary to reach the desired suppression.

Example Completed: The Geographic and Size Range filters will remain aggregated, and the 1st priority Industry filter of NAICS 6, Sawmills, will be applied. If the desired suppression level is not reached, the Industry filter will change to NAICS 5, Sawmills and Wood Preservation, and the Size and Geographic filters will be reset and re-applied as above. If necessary the industry filter will continue to change the NAICS level and retry the Geographic and Size Range filters until the desired suppression level is met.