

AlignStar Training

1. PowerPoint Presentation
2. Activation
3. Creating a new document with the Wizard
 - a. Note Tip of the Day feature
 - b. Use existing territory definitions
 - c. Data Link (browse & select file to link to)
 - i. "Bibliotek Territories.csv"
 - d. Link geocoded field in file to AlignStar Map Layer
 - i. Use VCR buttons to scroll through file
 - e. Select alignment fields
 - i. Use field labels to name... if desired
 - ii. Select T, D, & R fields from drop downs (build from bottom up)
 - f. Rep File Link
 - i. Browse to file
 1. "Bibliotek Reps.xls"
 - ii. Link geocode field to map layer
 - iii. Select ID field for reps
 - g. Save File!
4. AlignStar Help Features
 - a. Overview of Online Help System and Tutorial
 - b. Tool Tips
5. Navigation
 - a. Zoom toolbar
 - i. Click to zoom
 - ii. Zooming by redefining selection area
 - iii. Previous zoom
 - iv. Panning / scrolling
 - v. Restore full view
6. Text, Pushpins, and Symbols
7. The Layers Tab
 - a. Define alignment layer
 - i. Red check mark signifies current alignment layer
 - b. Turning layers on and off

- i. Make Alignment Layer transparent
 - c. Changing alignment layer via right click menu
 - d. Layer Properties Dialog (right click)
 - i. Line style & color
 - e. Labels (right click menu)
 - i. Code / name labels
 - ii. Allow overlapping labels vs. smart label feature
 - f. Labels (individual)
 - i. Label tool
 - ii. Label selection dialog
- 8. The Hierarchy Tab
 - a. Folder tree structure
 - i. Territory, district, & region structure
 - ii. Folder tab colors
 - b. Creating new T, D, & R's
 - c. Deleting folders
 - d. Renaming folders
 - e. Merging folders
 - f. Controlling view
 - i. Turning folders on and off
 - ii. Turning unassigned on and off
 - iii. Using "display only this item" feature
 - iv. Quick zoom
 - v. All on / all off
- 9. The Find Tab
 - a. Demonstrate by searching for:
 - i. ZIP Code
 - ii. ZIP Name
 - iii. Other geographic levels (make sure they are turned on in layers tab)
 - iv. Double click or Enter to quick zoom
- 10. The Legends Tab
 - a. Double click to quick zoom on a territory
- 11. Link Maintenance
 - a. How to add / remove data sources
- 12. Querying Map Units

- a. Data Source Query
- b. Instant Query
 - i. Name, Code, or Data selectable from “view” menu

13. The Browser

- a. Select data source to display
- b. Scroll through data records
- c. Search for specific ZIP Codes
- d. Move / hide data columns
- e. Sort by data column
- f. Display other data summary levels!
- g. Unassigned / unlinked data
- h. Switch to territory summary level
 - i. Display percent deviation
- i. QuickZoom from Browser

14. Data Dots

- a. Rep locations
- b. Use dots for 1 variable
 - i. Display
 - ii. Modify each dot =, re-display
 - iii. Change color, symbol, size
- c. Go over graduated dot tab
- d. Change Summary Level

15. Thematic

- a. Basic Thematic Features
- b. Sample with Circulation by zip
- c. Sample with Circulation by county
- d. Data Dots with Thematic
- e. Multi-variable

16. Alignment

- a. Make sure browser is displayed at territory summary
- b. Individual unit alignment
 - i. Left click with alignment tool
 - ii. Note data totals for and dithering of selected unit
 - iii. Accept current destination, or select new from drop down
 - iv. Note browser totals
 - v. How to Undo

- vi. How to align to current destination (bypass destination dialog)
 - 1. Select destination in Hierarchy tab or right click menu on map
 - 2. SHIFT + LEFT CLICK
 - c. Lasso Alignment
 - i. LEFT CLICK and Hold to draw shape
 - ii. Release mouse button after drawing desired shape
 - iii. Accept or select new destination
 - iv. Radio button options on what to include in realignment
 - v. Use SHIFT + LEFT CLICK to align to current destination.
 - d. Drag and Drop Alignment
 - i. Hold down CTRL + LEFT CLICK while dragging
 - ii. Drag to folder, browser, or neighboring territory
 - iii. Individual unit drag & drop alignment from the Browser
 - e. Upper level alignments
 - i. Graphically
 - ii. By dragging folders in the hierarchy tab
 - f. Align from data source
 - g. Alignment date feature
17. The Territory Expert
- a. Menu item and tool
 - b. Select variable to analyze
 - i. Can be run in current alignment or optimization tab.
 - c. Explain report card grading criteria
18. The Optimizer
- a. Select data variable(s)
 - i. Relative weight (if applicable)
 - b. Parameters
 - i. Number of territories / data total
 - 1. For focused optimization, choose both
 - ii. Hierarchy Naming Template
 - 1. Choose naming mask and starting value
 - 2. Options to concatenate to lower levels / use city names
 - iii. Optimization Options
 - 1. Number of districts and regions

- 2. Difference between algorithms (leave on automatic for best results)
 - 3. Fit to state boundaries, use rep locations for centers
 - c. Show results
 - d. Accept results (under alignment menu)
 - i. Options to delete entire existing hierarchy
 - ii. Delete empty items when finished
 - iii. Keep existing
 - e. Selected area optimization
- 19. Charts
- 20. Reports
 - a. Standard report templates
 - b. Max variables for landscape is 5, portrait is 3
 - c. Updated reports Gain Loss and Percent Deviation
 - d. Can create custom reports for use in AlignStar with Crystal Reports
- 21. Exporting Data
- 22. Printing Maps
 - a. Printing current view
 - b. Batch printing
 - i. To graphics or printer
 - ii. Substitution strings when output to printer
- 23. Accounts
 - a. Build account based document
 - b. Account rules
 - c. Align accounts
 - d. List Data Records
 - e. Optimizing Accounts
- 24. Field Changes
- 25. Preferences Dialog
 - a. General (global) settings
 - b. Document specific settings
- 26. Questions / Review / Open