



Locus™ Professional Tutorial

Dakota Worldwide Corporation
4801 West 81st Street, Suite 105
Minneapolis, Minnesota USA 55437

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About This Tutorial

What You Should Know

This LOCUS™ Pro Tutorial is intended for the experienced LOCUS™ user. Consider it a reference guide to quickly gain familiarity with all of the additions to the new LOCUS™ Pro.

LOCUS™ Professional requires an Installation CD. Once installed updates for LOCUS™ Pro will be posted on the Dakota Worldwide website: www.dakotaww.com.

LOCUS™ Pro will read in any Balance or Tactic files created in LOCUS™ 2000/2002. However, once it is saved in LOCUS™ Pro, it will no longer read into LOCUS™ 2002. Dakota Worldwide will no longer support updates for LOCUS™ 2002 and can be uninstalled once LOCUS™ Pro is up and running.

To install LOCUS™ Pro You must first copy your files from LOCUS™ 2000/2002. Make sure to copy security. loc because by coping this file you will NOT need to call for a code. If you save changes to a Locus.sys file you must also copy that.

If you need information on market analysis procedures, collecting data or GIS Mapping compatibility, contact Dakota Worldwide:

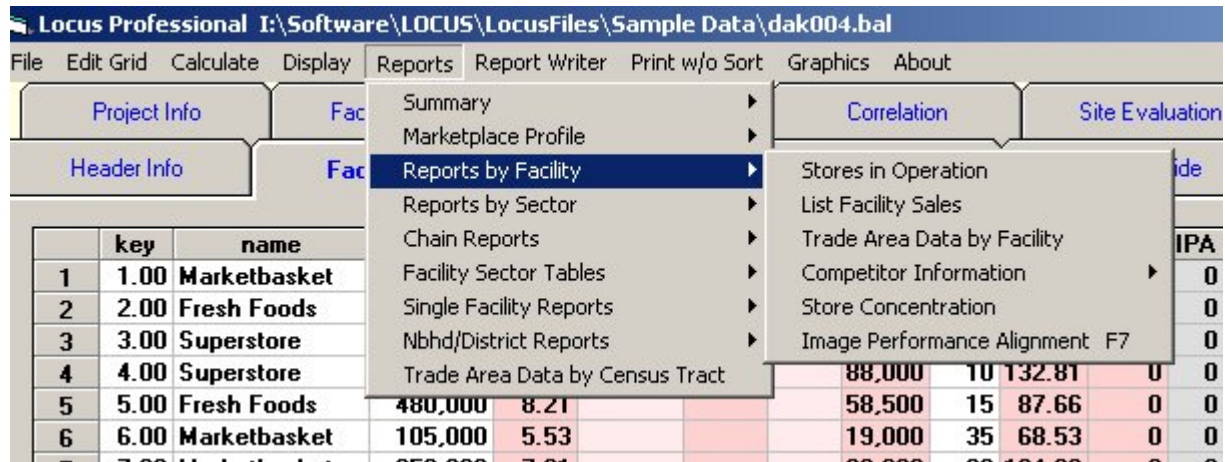
Email: Dakota@dakotaww.com

Phone: 952.835.4505

Toll Free: 1.800.475.4505

Main Screen

Reports



Locus Professional has modified the “Reports” menu. Reports are grouped based on type of report in order to provide a more intuitive access to a report.

Locus Professional I:\Software\LOCUS\LocusFiles\Sample Data\dak004.bal																
File		Edit Grid	Calculate	Display	Reports	Report Writer	Print w/o Sort	Graphics	About							
Project		Float				Sector Groups		Correlation		Site Evaluation						
Header In		Image F1				Sectors		Barriers		Curve Override				Ima		
		Market F2														
		Intermediate Population														
		PCE														
	key		sqft	calc vol	\$/sqft	ta dif	sqft	draw	image	i-rank	IPA	curve	r			
1	1.00	Adjust Float (fix flt)	100	120,000	8.00	0	15,000	15	207.70	2	21	80.00				
2	2.00	Calc Sector Radius	46	499,997	7.46	-1	67,000	30	135.97	6	10	50.00				
3	3.00	Update Sector Radius	53	789,995	10.53	-1	75,000	30	162.72	3	2	50.00				
4	4.00	Release Float	93	1,050,004	11.93	0	88,000	10	285.96	1	4	50.00				
5	5.00	Close Highlighted Facil	21	480,002	8.21	0	58,500	15	92.70	8	15	50.00				
6	6.00	Open Highlighted Facil	53	105,000	5.53	0	19,000	35	71.82	15	20	66.00				
7	7.00	Adjust Curve / Calc Image	81	250,001	7.81	1	32,000	90	138.08	5	3	75.00				
8	8.00	Basket Foods	431	125,000	4.31	0	29,000	95	79.75	14	17	75.00				
9	9.00	Marketbasket	750	90,000	7.50	0	12,000	95	89.84	9	11	75.00				

“Adjust Curve / Calc Image” has been added to the “Calculate” menu. The program adjusts the curve and recalculates the image of the selected facility in order to align the facility’s image rank with the IPA. This can be a significant time saver when starting the modeling of a medium to large sized trade area. Select the curve of only one store prior to the calculation.

Project Info Tab

Locus Professional I:\Software\LOCUS\LocusFiles\Sample Data\dak004.bal

File Edit Grid Calculate Display Reports Report Writer Print w/o Sort Graphics About

Header Info Facilities Sectors Barriers Curve Override

Project Info Facility Groups Sector Groups Correlation Site Evaluation

Project Number DAK003

Study Location Dakota City, Minnesota

Analyst of Record John Doe

Client Description Client Company

Census Year 1990

Default File Path * I:\Market Analysis\DAVE\ Set File Path

Default Map File Path Set File Path

Years from field work to 2nd population numbers 1 Years from field work to 3rd population numbers 3

Low Draw (for reports)* 0 Low Vol for Stores in Oper

Market Share Cutoff * 1

Facility Ratings 1-Grocery

Price store IPA adjustment % 100

Include Addresses * No

IPA Weights - whole numbers - must add up to 100

Obs Vol	20	TA Vol	20	Ratings	20
Obs \$/SF	20	TA \$/SF	20	Check Weights	

* - In .sys file - not in model file

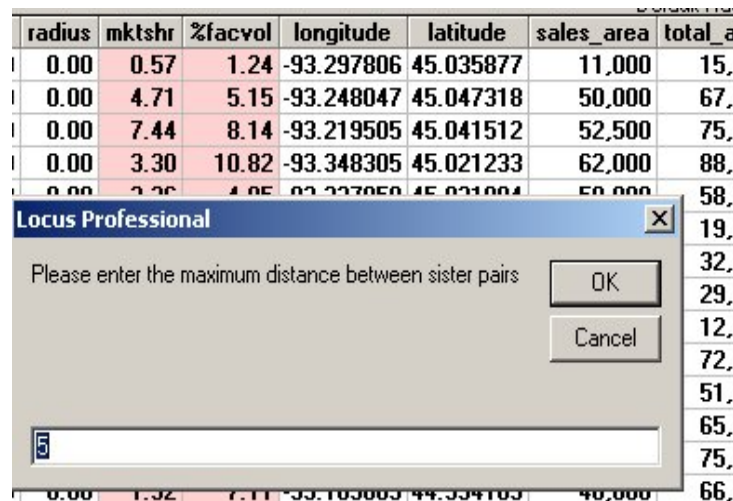
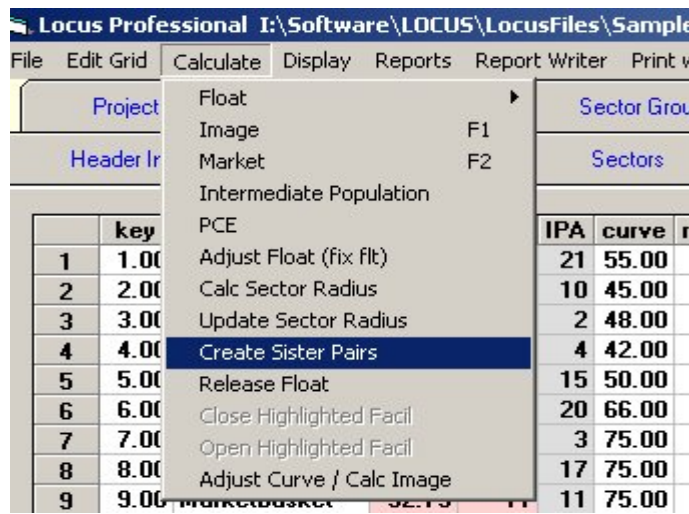
The user can customize the IPA calculation by increasing or decreasing the weights of the five variables, thus incorporating the users own modeling values into Locus.

Facility Tab-Edit Grid-IPA diff sort

File	Edit Grid	Calculate	Display	Reports	Report Writer	Print w/o Sort	Graphics	About					
	Insert Row Delete Row Append Row Add x Rows Del Highlighted Rows Close Cur Open Ident Copy Paste Sort Descend Sort Ascend Facility Group Sort Sector Group Sort IPA diff Sort Group Mutiply Group Add Renumber Create Group Hi-Lite (Facility or Sector)	Facility Groups		Sector Groups		Correlation		Site Evaluation		Map			
		Facilities		Sectors		Barriers		Curve Override		Image			
		Delete											
			obs vol	\$/sqft	calc vol	\$/sqft	ta dif	sqft	draw	image	i-rank	IPA	curve
			90,000	7.50	90,000	7.50	0	12,000	95	61.78	19	11	70.00
			790,000	10.53	790,004	10.53	1	75,000	30	130.11	6	2	48.00
			250,000	7.81	250,000	7.81	0	32,000	90	125.56	7	3	75.00
			725,000	10.07	725,003	10.07	2	72,000	85	135.11	5	1	61.00
			185,000	6.98	184,999	6.98	0	26,500	25	53.41	21	19	64.00
			130,000	7.65	129,999	7.65	0	17,000	35	55.48	20	18	60.00
			125,000	4.31	125,000	4.31	0	29,000	95	63.61	18	17	70.00
			600,000	11.76	600,002	11.76	0	51,000	10	81.44	14	13	37.00
			500,000	7.46	500,002	7.46	1	67,000	30	90.08	10	10	45.00
			450,000	11.69	449,998	11.69	-1	38,500	25	90.52	9	9	58.00
			500,000	11.36	499,997	11.36	-1	44,000	25	95.52	8	8	54.00
			610,000	9.38	610,002	9.38	0	65,000	10	81.69	13	14	40.00
			690,000	10.45	690,000	10.45	0	66,000	7	85.54	11	12	40.00
			85,000	7.39	85,000	7.39	0	11,500	75	75.69	15	16	90.00
15	15.00	Fresh Foods	615,000	9.69	614,998	9.69	0	63,500	25	143.28	4	6	64.00
16	16.00	Superstore	700,000	10.77	699,997	10.77	-1	65,000	25	147.25	3	5	67.00
17	4.00	Superstore	1,050,000	11.93	1,049,998	11.93	0	88,000	10	197.44	1	4	47.00
18	5.00	Fresh Foods	480,000	8.21	479,999	8.21	0	58,500	15	83.16	12	15	50.00
19	1.00	Marketbasket	120,000	8.00	120,000	8.00	0	15,000	15	64.12	17	21	55.00
20	6.00	Marketbasket	105,000	5.53	105,000	5.53	0	19,000	35	64.70	16	20	66.00
21	13.00	Superstore	900,000	12.00	900,001	12.00	0	75,000	7	174.49	2	7	43.00

“IPA Diff Sort” has been added to the “Edit Grid” menu. This sorts the stores by the difference between the “i-rank” and “IPA” columns. The sample above is already sorted. (i-rank vs. IPA). Stores that are the most out of alignment can be identified quickly and dealt with first.

Calculate- Create Sister Pairs



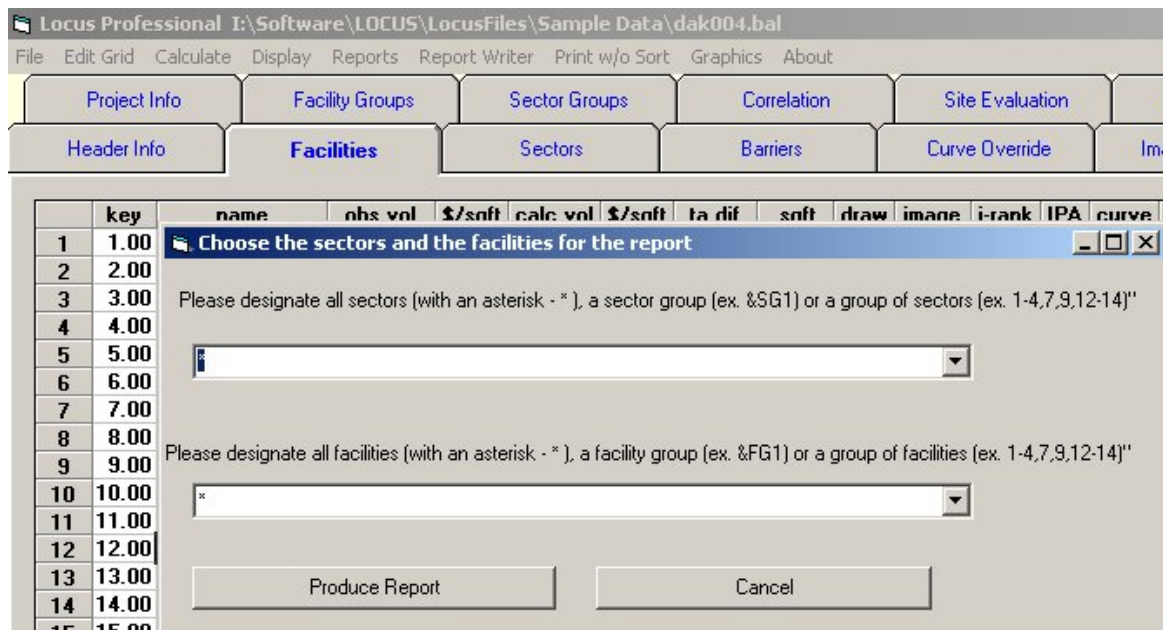
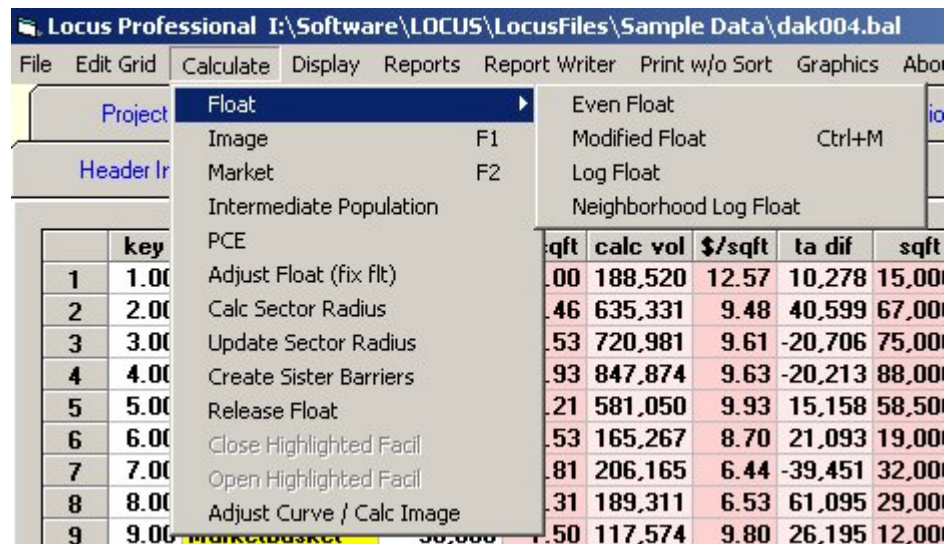
”Create Sister Pairs” has been added to the “Calculate” menu. User must enter maximum distance and barrier weight. A sister pair is created when two facilities have the same chain name and are closer than the maximum distance specified.

Facility or Sector Tab-Edit Grid- Hi Lite (Facility or Sector)

File	Edit Grid	Calculate	Display	Reports
	insert row			y Groups
	delete row			
	append row			ties
	add x rows			
	del highlighted rows			0 Pop
1	Close Cur. Open Ident			1,525
2	copy			1,260
3	paste			1,210
4	sort descend			2,215
5	sort ascend			1,265
6	facility group sort			1,515
7	sector group sort			1,895
8	IPA diff Sort			2,210
9	group multiply			1,255
10	group add			2,375
11	Renumber			1,725
12	Create Group			2,020
13	Hi-Lite (Facility or Sector)			2,300
14				2,100
15	15.00	18.00	914	850
16	16.00	17.00	1,853	1,700
17	17.00	24.00	2,106	1,800
18	18.00	25.00	2,563	2,385
19	19.00	30.00	1,185	1,185
20	20.00	36.00	1,328	1,375
21	21.00	31.00	2,180	1,955
22	22.00	37.00	1,340	1,300
23	23.00	26.00	2,039	1,940
24	24.00	26.00	412	400
25	25.00	40.00	1,996	1,900
26	26.00	40.00	1,561	1,400
27	27.00	40.00	1,888	1,725
28	28.00	39.00	1,592	1,500

Facilities and sectors can now be “marked” with yellow highlight to serve as a pointer for the user. Highlighting can be reversed by re-highlighting the facility or sector. A user may wish to mark a facility/sector that needs further attention or may choose to mark each facility/sector after it has been reviewed. The highlighting always appears in the second column. (The color of the first column is used in group sorts.)

Calculate-Float-Neighborhood Log Float

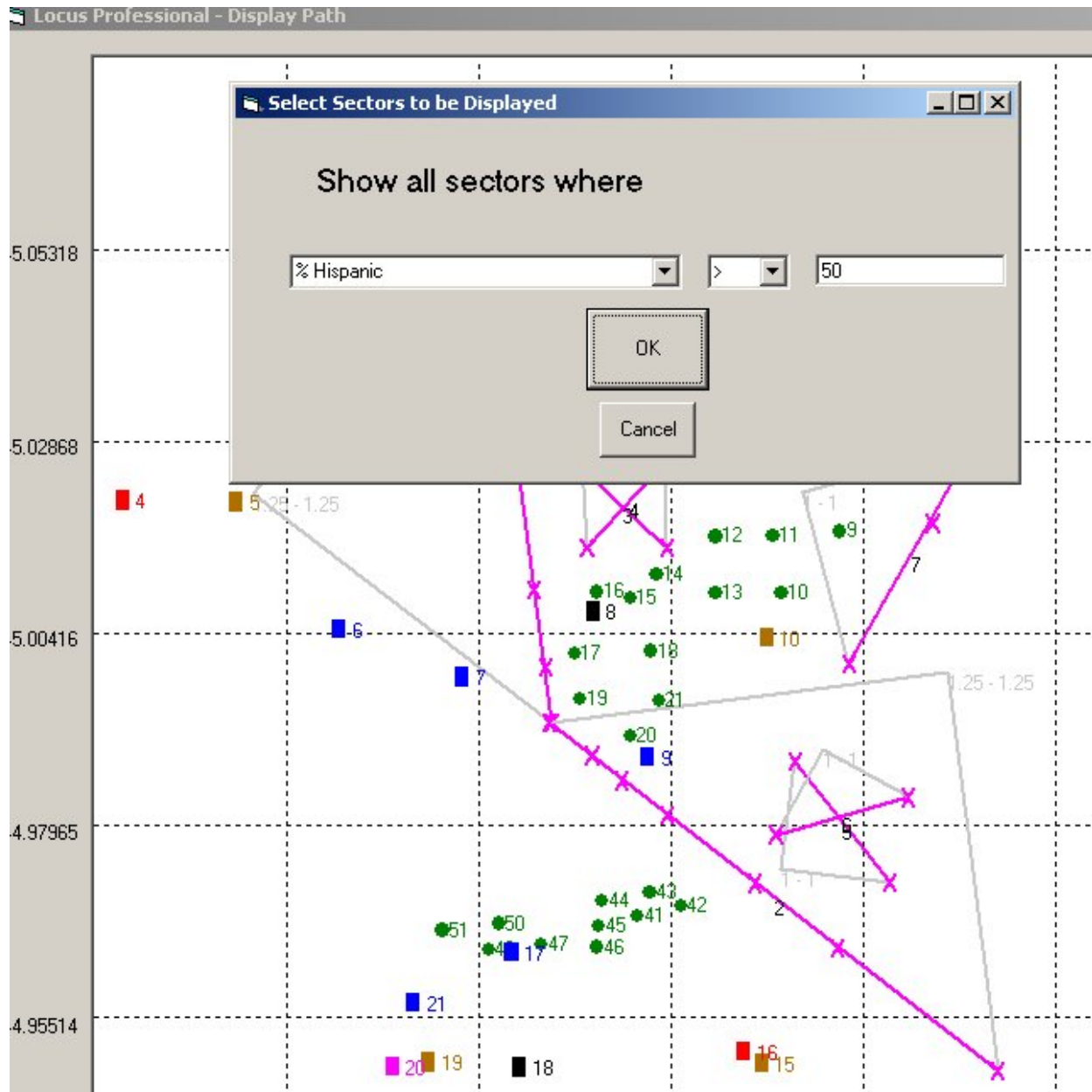


“Neighborhood Log Float” has been added to “Calculate” – “Float” menu. Float is distributed within a user selected neighborhood or area. Facilities, sectors, and radius are designated, and then float is distributed within those boundaries. Typically, the user would designate every facility and sector to a particular “neighborhood”.

This could be helpful when certain demographic or geographic characteristics divide up a trade area or two towns are part of one trade area.

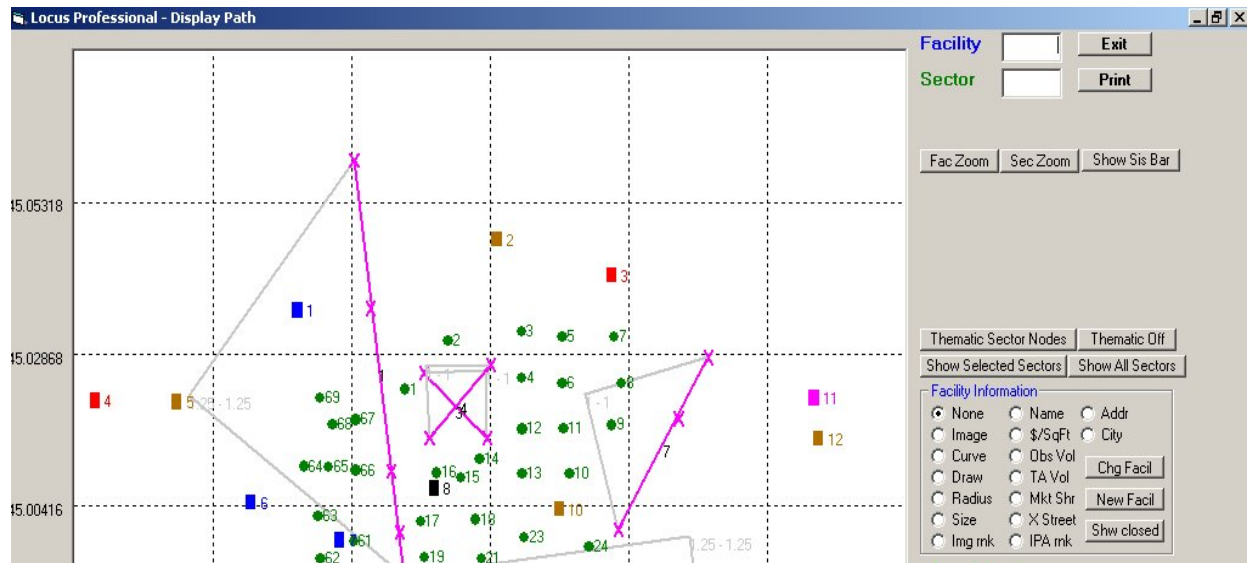
Display Path Screen

Show Selected Sectors



A "Show Selected Sectors" button has been added to the "Display Path" screen. Only sectors that meet the specified demographic qualifications are shown. The "Show All Sectors" button undoes the sector selection. A user can quickly target and display sectors for better understanding of the trade area. The sample above shows all sectors over 50% Hispanic.

Thematic Sector Nodes



The 'Thematic Sector Nodes' dialog box is shown. It has a title bar with a folder icon and the text 'Thematic Sector Nodes'. The main area is divided into two columns. The left column is for '% Hispanic' and the right column is for 'Median Household Income'. Each column has a color-coded legend with a corresponding value. The legend for '% Hispanic' shows a red square for '> 80', an orange square for '> 60', a yellow square for '> 40', a cyan square for '> 20', and a blue square for '<= to the above amount'. The legend for 'Median Household Income' shows a red square for '> 85000', an orange square for '> 65000', a yellow square for '> 45000', a cyan square for '> 25000', and a blue square for '<= to the above amount'. Below the legends are 'OK' and 'Cancel' buttons. At the bottom right, there is a section for 'Legend - upper left corner of map' with radio buttons for 'Legend Off' and 'Legend On'.

For Example With

% Hispanic

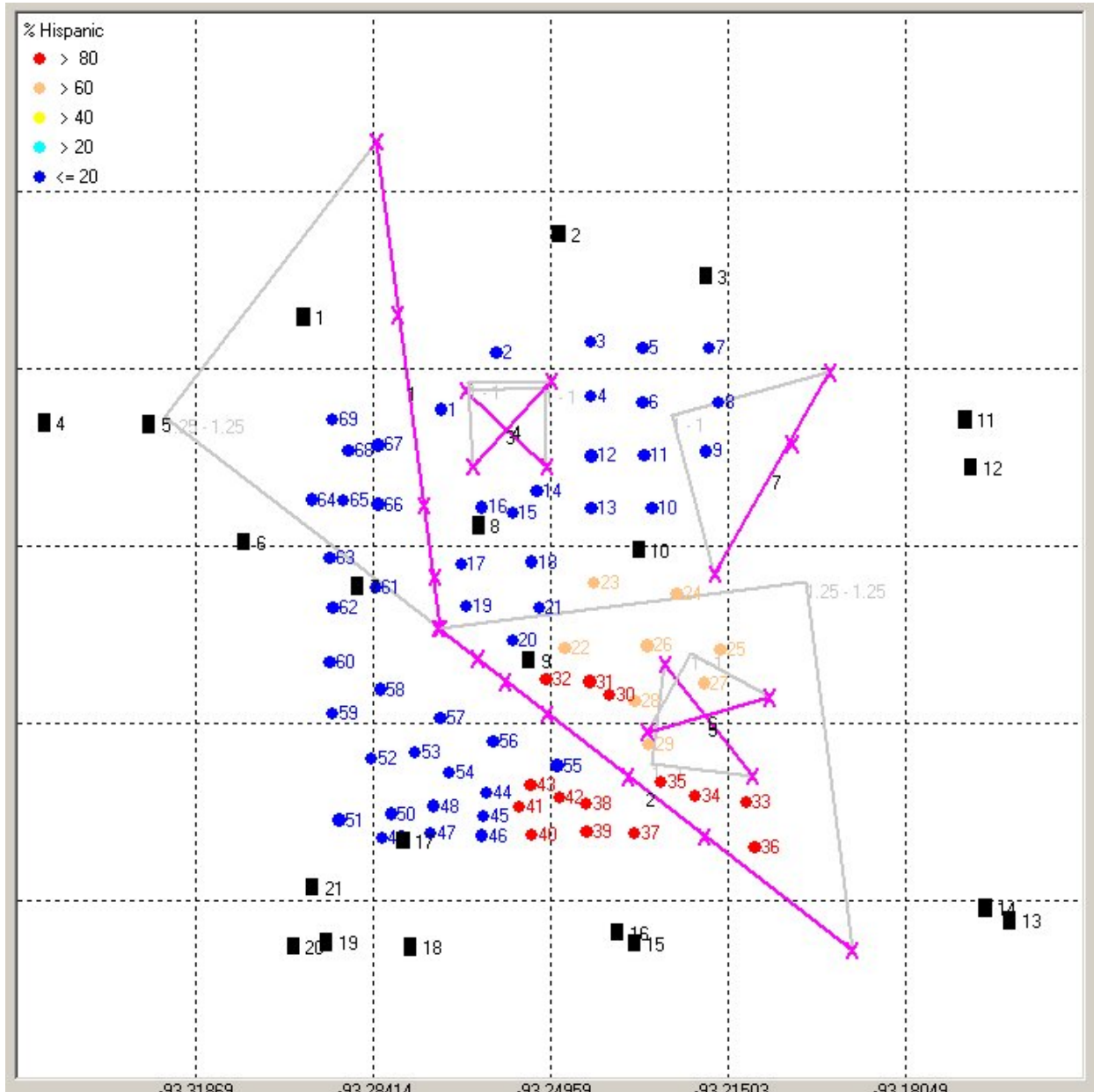
Median Household Income

The sector node would be yellow if the median household income for the sector were greater than 45000 and less than or equal to 65000.

Legend - upper left corner of map

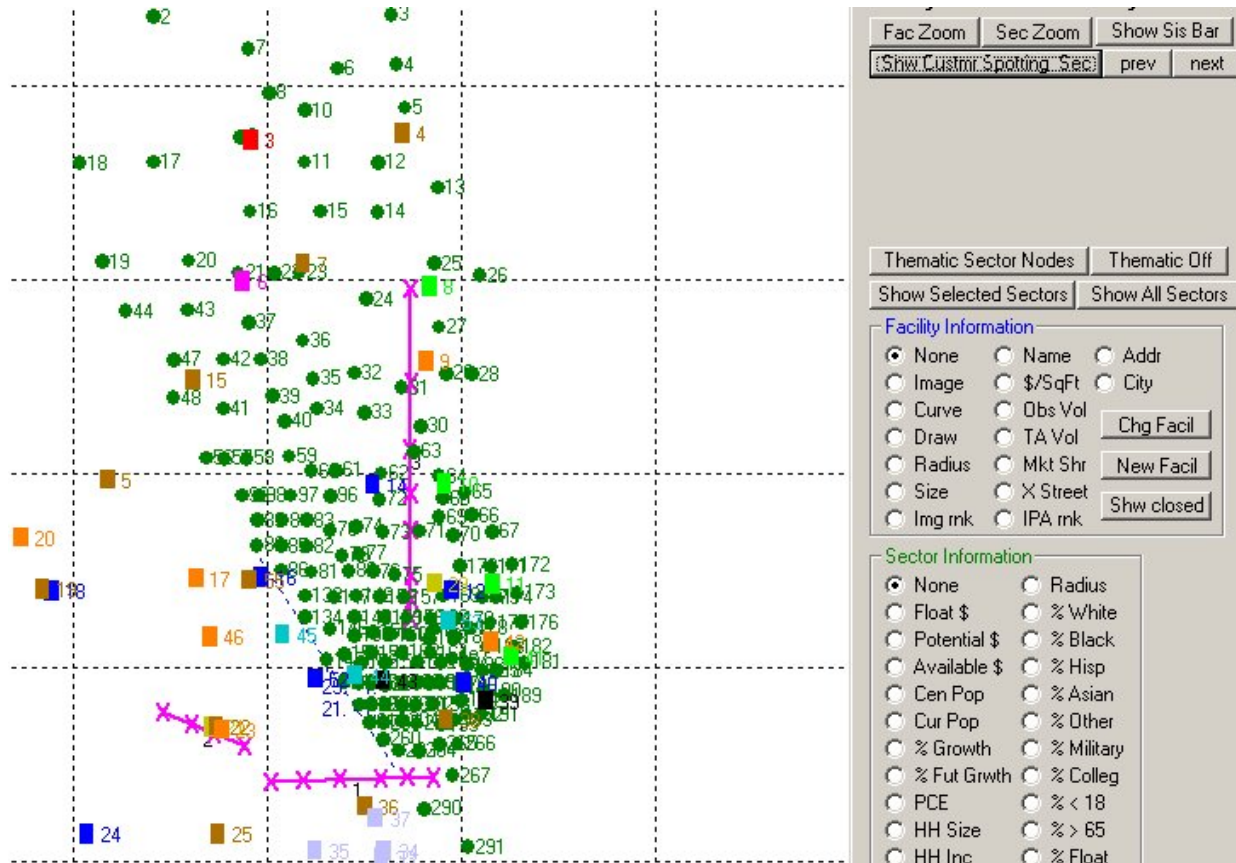
Legend Off

Legend On



Thematic colorization is accessible through the “Thematic Sector Nodes” button added to the “Display Path” screen. Each variable can be color grouped based on individual sector value. User has full control of the ranges and can quickly view demographic variables throughout the trade area. The “Thematic Off” button turns off the sector node colorization. An optional legend appears in the upper left corner of the map.

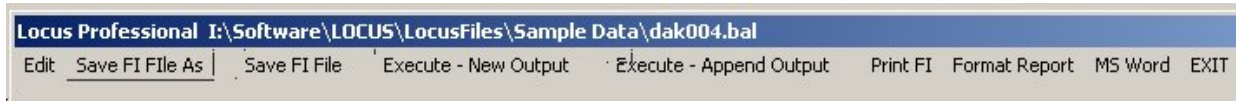
Show Customer Spotting Sectors



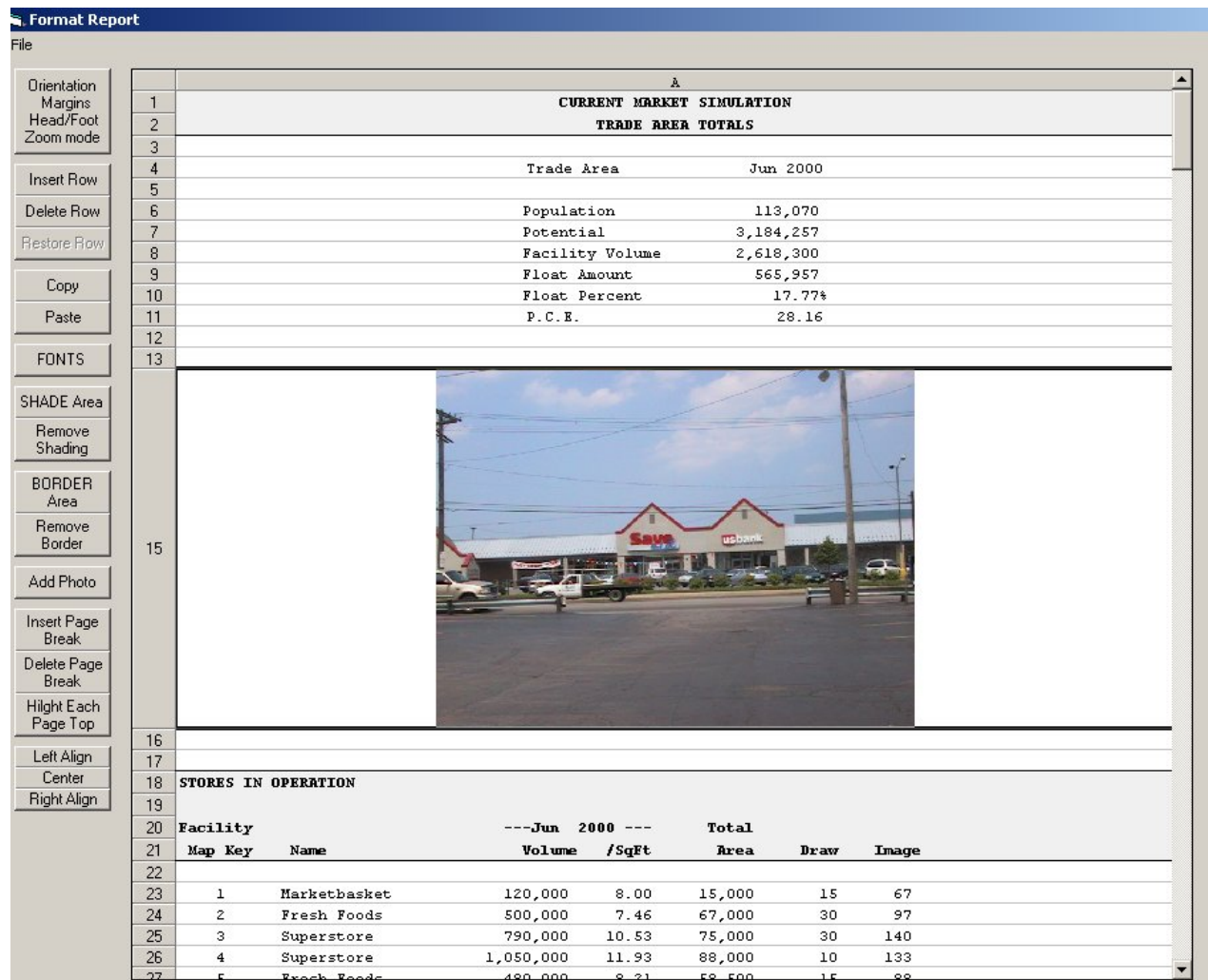
Note “Shw Custmr Spotting Sec” button. This function displays the sectors that were included as part of a customer spotting for a particular store.

Report Writer Screen

Format Report/MS Word



Two new menu items, “Format Report” and “MS Word”, have been added to the “Report Writer” menu bar. They provide quick access to start formatting a report via Locus or MS Word.



The new “Format Report” screen allows a report created in Locus “Report Writer” to be totally formatted within Locus. Formatting includes headers/footers, page breaks, shading, boxing, and even inserting a store or site picture. Look into this new feature, there is more!

Tactics

Although this is not a new tool of Locus, it is included in this tutorial. It has quickly become a favorite for real estate developers and citywide redevelopment projects.

Reports-Multiple Location Facility Volume

The screenshot shows a Windows-style dialog box titled "Parameters for Multiple Location Facility Volume Report". It contains several input fields and sections for configuring the report parameters:

- Search Spacing Distance:** A text box with the value "1".
- Border Exclusion Distance:** A text box with the value "0".
- Facility Exclusion Distance:** A text box with the value "0".
- Exclusion Facility Group:** A text box for specifying facility groups.
- Draw:** A text box.
- Image:** A text box.
- Curve:** A text box.
- Radius:** A text box.
- Size:** A text box.
- Auto Transfer to Facility Table:** A section with two radio buttons: "No" (selected) and "Yes". Below them is a text box labeled "Maximum # of test sites to transfer".
- Special Curve Information:** A section with a dropdown menu for "Use the curve of the closest facility with the following chain name" and a text box for "Add the following number to the curve of the facility found using the above criteria".
- Special Image Information:** A section with a dropdown menu for "Use the image of the closest facility with the following chain name" and a text box for "Add the following number to the image of the facility found using the above criteria".
- Instructions:** A note stating: "Please designate all facilities (with an asterisk (*)), a facility group (ex. &FG1) or a group of facilities (ex. 1-4,7,9,12-14)".
- Buttons:** "OK" and "Cancel" buttons at the bottom.

This report is utilized primarily in metro studies. It is a report tool used to direct the user to the areas within the trade area that, on the surface, show the most potential for adding a store or stores. It performs sales calculations for potential locations individually throughout the trade area in a grid like manner. The distance spacing between each test site is user selected. A greater spread will improve processor speed, however there is less detail. The user can request that the best test store locations be transferred to the facility grid. From there, the test locations are opened so the locations can be assessed in the Display Path screen.

The user provides the following information:

- 1 – Search Spacing Distance- Mile spacing of each test store
- 2 – Border Exclusion distance- Mile distance not tested from Locus node border
- 3 – Facility Exclusion Distance- Mile distance not tested from selected store groups
- 4 – Exclusion Facility Group
- 5 – Draw
- 6 – Image
- 7 – Curve
- 8 – Radius- Zero is default radius
- 9 – Size
- 10– Auto Transfer- Top test stores are sorted and will transfer to facility grid, Test Store 1000 is always the highest volume.
- 11– Special Curve Information- The test store will take on the relative curve of the closest store within a selected chain. This is optional.
- 12 – Special Image Information- The test store will take on the relative image of the closest store within a selected chain. This is optional.

Parameters for Multiple Location Facility Volume Report

Search Spacing Distance:

Border Exclusion Distance:

Facility Exclusion Distance:

Exclusion Facility Group:

Draw:

Image:

Curve:

Radius:

Size:

Please designate all facilities (with an asterisk (*)), a facility group (ex. FG1) or a group of facilities (ex. 1-4,7,9,12-14)

Auto Transfer to Facility Table

☐ No
☒ Yes

Maximum # of test sites to transfer:

Special Curve Information

Use the curve of the closest facility with the following chain name:

Add the following number to the curve of the facility found using the above criteria:

Special Image Information

Use the image of the closest facility with the following chain name:

Add the following number to the image of the facility found using the above criteria:

OK Cancel

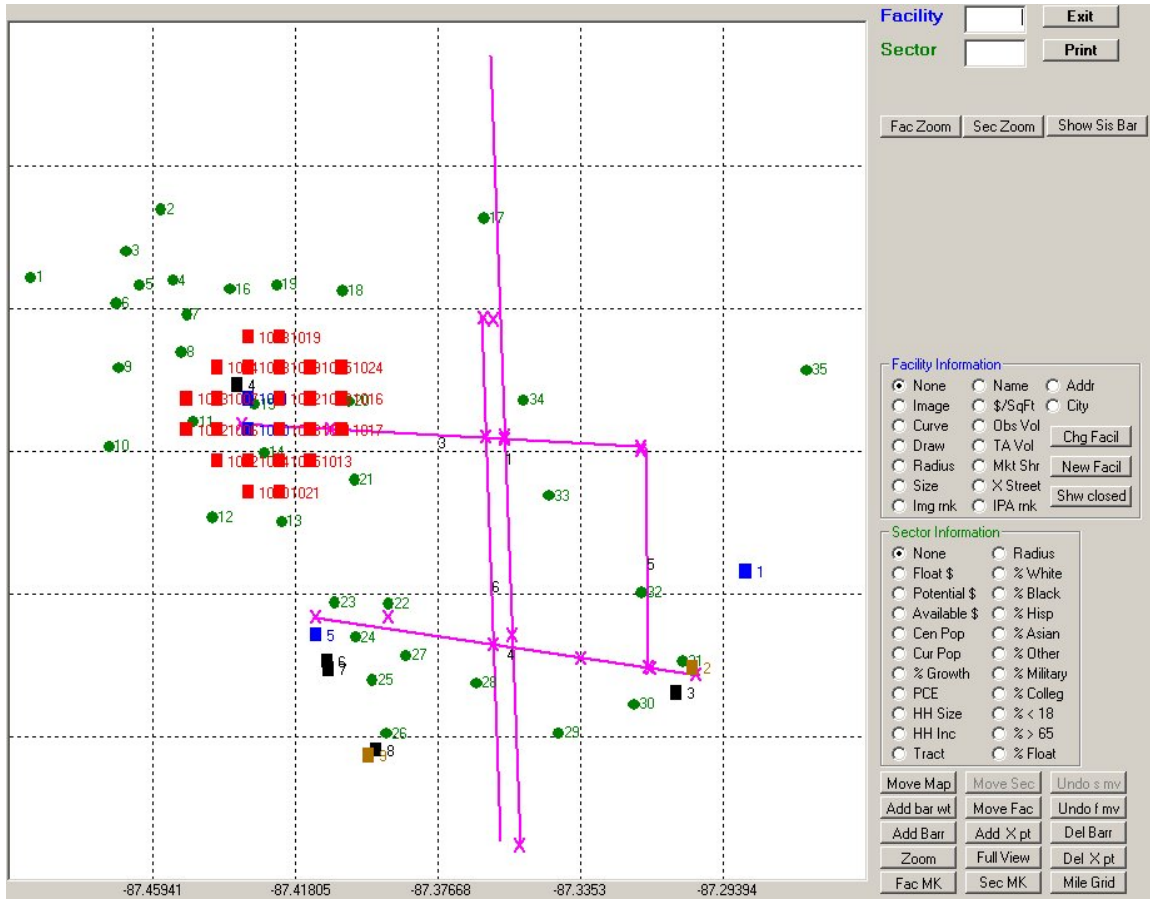
Screen with parameters filled in.

Header Info		Facilities		Sectors		Be
Project Info		Facility Groups		Sector Groups		Correla
Del Col	Print	Write to xls File		Write to tab File		Add blank
	A	B	C	D	E	
1	Multi Location Facility Volumes					
2						
3	Draw=90	Image=125	Curve=65	Radius=0	Size=29000 SqFt	
4	Spacing = 0.5 mi. Bor Size = 1.5 mi.					
5						
6	Map Key	Name	Facility Volume	Longitude	Latitude	
7						
8	1000	Test Site	417,112	-87.431847	36.629417	
9	1001	Test Site	415,429	-87.431847	36.636669	
10	1002	Test Site	411,592	-87.422844	36.636669	
11	1003	Test Site	409,088	-87.422844	36.629417	
12	1004	Test Site	407,573	-87.431847	36.622166	
13	1005	Test Site	406,181	-87.422844	36.622166	
14	1006	Test Site	405,753	-87.440849	36.629417	
15	1007	Test Site	402,869	-87.440849	36.636669	
16	1008	Test Site	401,891	-87.431847	36.643921	
17	1009	Test Site	400,890	-87.422844	36.643921	
18	1010	Test Site	399,723	-87.413841	36.636669	
19	1011	Test Site	396,218	-87.413841	36.629417	
20	1012	Test Site	392,896	-87.440849	36.622166	
21	1013	Test Site	392,141	-87.413841	36.622166	
22	1014	Test Site	389,849	-87.440849	36.643921	
23	1015	Test Site	388,930	-87.413841	36.643921	
24	1016	Test Site	387,378	-87.404839	36.636669	
25	1017	Test Site	386,960	-87.404839	36.629417	
26	1018	Test Site	381,119	-87.431847	36.651173	
27	1019	Test Site	380,444	-87.422844	36.651173	
28	1020	Test Site	380,180	-87.431847	36.614914	
29	1021	Test Site	379,979	-87.422844	36.614914	
30	1022	Test Site	379,087	-87.449852	36.629417	
31	1023	Test Site	378,033	-87.449852	36.636669	
32	1024	Test Site	371,417	-87.404839	36.643921	
33	1025	Test Site	370,770	-87.440849	36.651173	
34	1026	Test Site	369,245	-87.413841	36.651173	
35	1027	Test Site	367,927	-87.449852	36.643921	

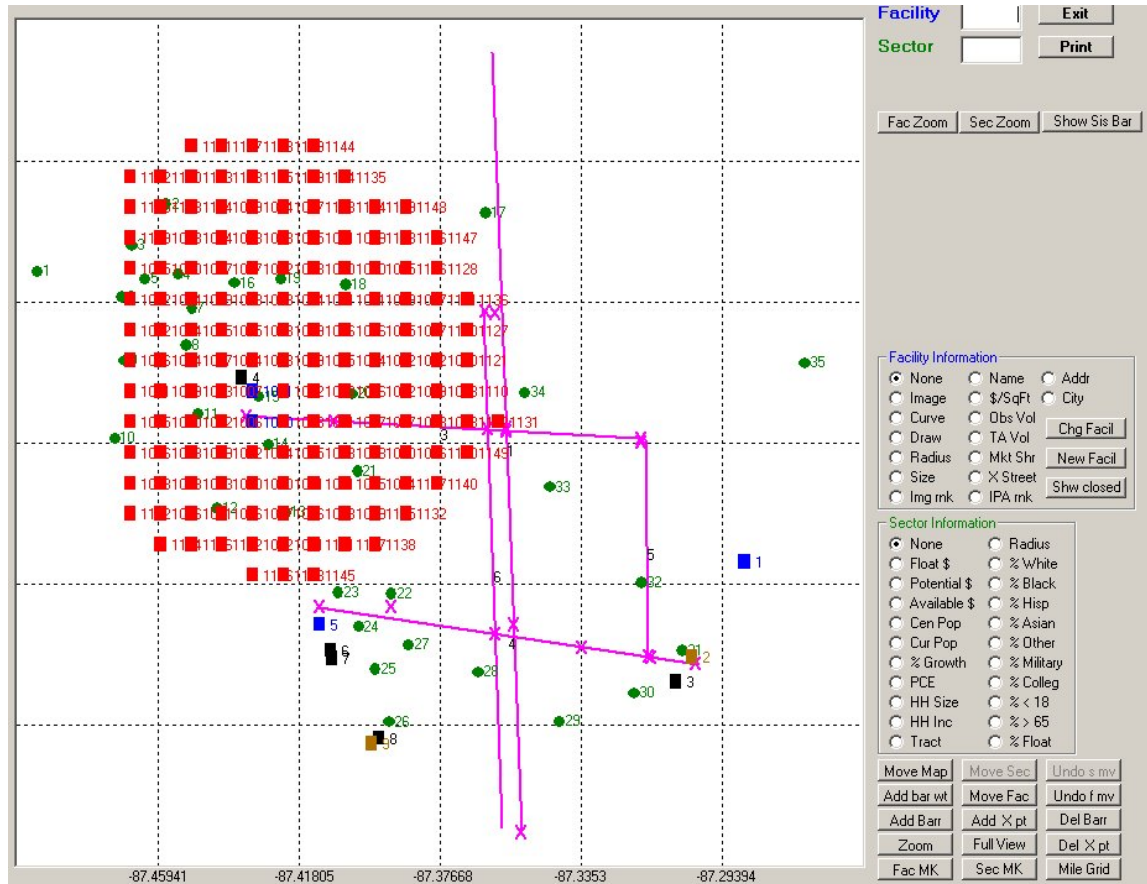
Once all parameters are filled in, process the report. This can take seconds or minutes to process depending upon the size of the trade area and spacing of test sites. The resulting report is sorted with volume in descending order.

	key	name	obs vol	\$/sqft	calc vol	\$/sqft	ta dif	sqft	draw	image	i-rank	IPA	curve	radius	mktshr	%facvol
1	1.00	Wal-Mart SC	560,000	11.91				47,000	30	142.30	2	2	48.00	0.00		
2	2.00	Kroger	275,000	6.06				45,400	50	114.55	3	3	55.00	0.00		
3	3.00	Best Food	25,000	3.57				7,000	40	61.18	9	9	65.00	0.00		
4	4.00	Piggly Wiggly	65,000	7.39				8,800	90	91.41	5	5	78.00	1.00		
5	5.00	Cub Foods	625,000	13.30				47,000	80	143.00	1	1	55.00	0.00		
6	6.00	Aldi	60,000	6.52				9,200	60	90.00	6	6	59.00	0.00		
7	7.00	Food Lion	70,000	3.08				22,700	60	82.07	7	7	71.00	0.00		
8	8.00	Save A Lot	55,000	4.74				11,600	25	74.10	8	8	65.00	0.00		
9	9.00	Winn-Dixie	325,000	7.30				44,500	25	101.39	4	4	59.00	0.00		
10	1000.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
11	1001.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
12	1002.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
13	1003.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
14	1004.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
15	1005.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
16	1006.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
17	1007.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
18	1008.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
19	1009.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
20	1010.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
21	1011.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
22	1012.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
23	1013.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
24	1014.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
25	1015.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
26	1016.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
27	1017.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
28	1018.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
29	1019.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
30	1020.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
31	1021.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
32	1022.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
33	1023.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		
34	1024.00	Test Site	0	0.00				29,000	90	120.00	0	0	65.00	0.00		

Top Test sites auto transferred to facility grid. Calculate Open these test sites and then view their positions in Display Path.



Display Path with top 25 stores showing a definite pattern of high potential targets. From here, the user takes this information to validate it as an individual site. What is a valid draw, curve, and image for the individual test store? Road network, population density, chain competition, retail in area, demographics, etc need to be factored in.



Same trade area but with 150 test sites transferred. Notice test store grid pattern and border exclusion inside of outermost nodes or barriers on each side of the geography. This is what Locus uses as its border and is always in a rectangular shape. User controls spacing and exclusion areas.