

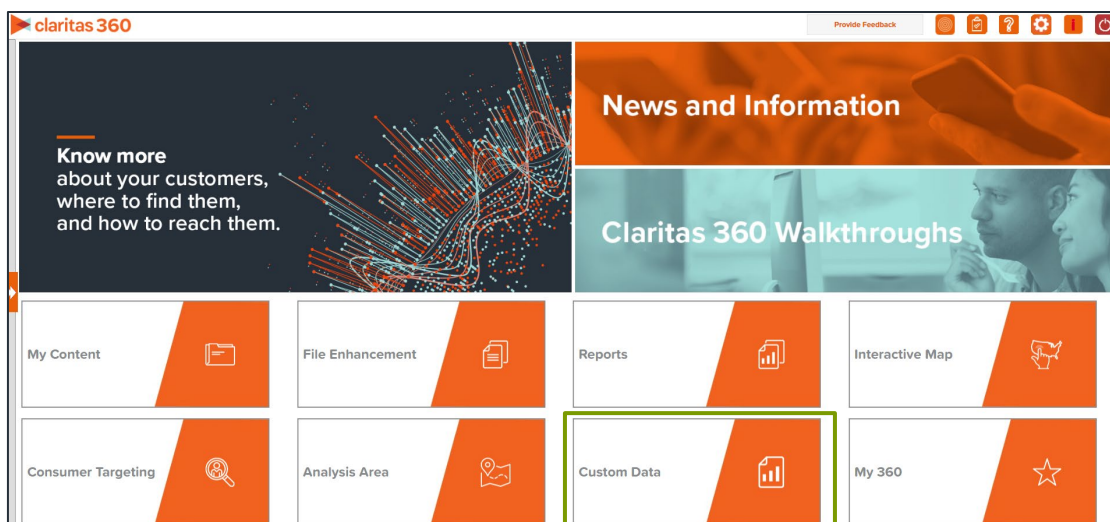
Location Filter

OVERVIEW

This document will take you through the process of creating location filters using either your imported locations or Claritas Business-Facts data.

LOCATION FILTER

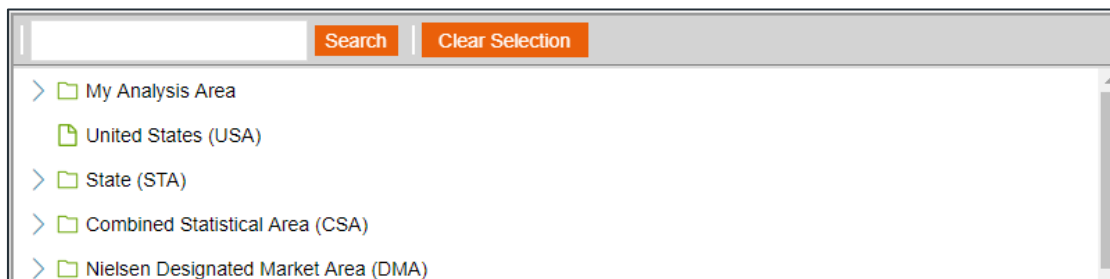
1. From the homepage, click on Custom Data.



2. Select Location Builder → Location Filter.

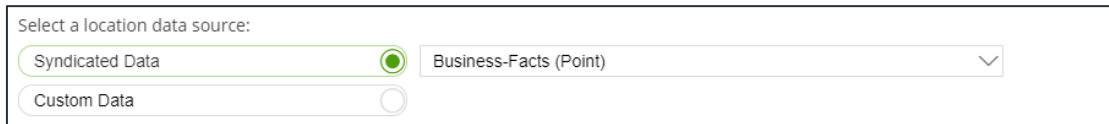
CREATE FILTER

1. On the Location Filter screen, select the analysis area(s) where the filtered locations will be pulled from. When a geography has been selected, the icon will turn green.



2. Select a location data source to use for creating the filter. The options are:

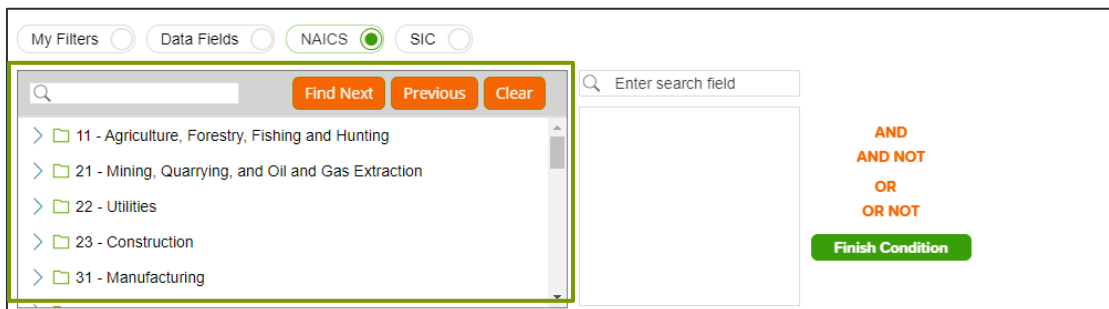
- Syndicated Data – Allows you to select a syndicated location data set.
Note: This option is only available if you license a location data set.
- Custom Data - Allows you to select from previously uploaded location files.



Click the category of elements or data type that you want to use to create your filter conditions. The options are:

CATEGORY AND DATA TYPES	
CATEGORY OR DATA TYPE	DESCRIPTION
My Filters	To select from previously created and saved filters
Data Fields	To select from the available fields in the data set
NAICS	To include North American Industry Classification System (NAICS) codes, the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. Only available when creating a Claritas Business-Facts filter.
SIC	To include Standard Industrial Classification (SIC) codes, a system used by government agencies to classify industry areas. Only available when creating a Business-Facts® filter.

4. After selecting an option, the related data category folders and elements will appear.



5. Use the search feature or expand a folder to navigate to and select the data element that you want to use. Your selection appears in the box located to the right.

The screenshot shows the 'Syndicated Data' interface with the 'Business-Facts (Point)' dropdown. The 'NAICS' filter is selected. The left pane shows a tree view of NAICS codes, with '236 - Construction of Buildings' selected. The right pane shows a search field and a list of results, including '236 - Construction of Buildings'. The 'Finish Condition' button is visible.

6. (Optional) If you select to use Data Fields to create your filter conditions, additional text boxes appear. Select an appropriate operator from the drop-down list.

Note: the search feature can be especially helpful when working with fields that contain a large number of different entries (such as Company Name).

The screenshot shows the 'Syndicated Data' interface with the 'Business-Facts (Point)' dropdown. The 'Data Fields' filter is selected. The left pane shows a list of data fields, with 'Company Name' selected. The right pane shows a search field and a list of results, including '0-0 0-0 1 24 HOUR 1 EMER'. The 'Finish Condition' button is visible.

FILTER OPERATORS		
OPERATOR	DEFINITION	EXAMPLE
Equals	Selects records where a specific field matches a given value exactly	Business Chain Name EQUALS 'Business A'
Not Equals	Selects records where the value does not match the specified condition	Ultimate Parent Name EQUALS 'Parent Name B' AND Business Chain Name NOT EQUALS 'Business C'
Contains	Checks if a field includes a particular word or phrase	Company Name CONTAINS Coffee
Is Null	Finds records where a field has no value	Parent Company is NULL
Is Not Null	Finds records where a field has a value	Primary SIC Code Equals 531102 and Company Name IS NOT NULL
Begins with	Selects records where a field starts with a given text	Company Name BEGINS WITH 'Business D'
Does not Begin with	Used to exclude records where a text field starts with a specified set of characters	NAICS Code EQUALS 445110 and Business Chain Name DOES NOT BEGIN WITH 'Business E'
Ends with	Selects records where a text field ends with a specific value	Company Name ENDS WITH Inc.
Does not End with	Used to exclude records where a text field ends with a specified set of characters	Company Name DOES NOT END WITH Inc.

FILTER CONDITIONS		
CONDITION	DEFINITION	EXAMPLE
Greater Than	Selects records where the value is greater than a specified threshold	Local Employees GREATER THAN 99
Lesser Than	Selects records where the value is below a specified threshold	Local Employees LESSER THAN 100
Greater Than Equal To	Includes values that are greater than or equal to a specified number	Local Employees GREATER THAN EQUAL TO 100
Lesser Than Equal To	Includes values that are less than or equal to a specified number	Local Employees LESSER THAN EQUAL TO 99
Between	Selects records within a numeric range	Local Employees BETWEEN 50,100
In	Matches records against a list of values	

7. (Optional) To add to your filter condition, click one of the following operators:


FILTER CONDITIONS	
FILTER CONDITION	DESCRIPTION
And	To add another condition
And Not	To specify a condition that must not be met
Or	To specify an alternative condition
Or Not	To specify an alternative condition that must not be met


8. The created condition appears next to the Filter Condition field.

The screenshot shows a web interface for creating filters. At the top, there are tabs for 'My Filters', 'Data Fields', 'NAICS' (which is selected), and 'SIC'. Below the tabs is a search bar with a magnifying glass icon and the text 'Enter search field'. To the right of the search bar are three buttons: 'Find Next' (orange), 'Previous' (orange), and 'Clear' (orange). Below the search bar is a list of categories with expandable arrows: '22 - Utilities', '221 - Utilities', '2211 - Electric Power Generation, Transmission and Distribution' (selected), '2212 - Natural Gas Distribution', and '2213 - Water, Sewage and Other Systems'. To the right of the list is a large empty box. Below the list is a 'Filter Condition' field containing the text 'NAICS Equals 2211 - Electric Power Generation, Transmission and Distribution' followed by a dropdown menu showing 'AND'. To the right of the 'Filter Condition' field is a 'Finish Condition' button (green) and a 'Name' field. The 'Finish Condition' button is highlighted with a green box.

9. (Optional) To add conditions, repeat Steps 6 through 9.
10. Click Finish Condition to indicate that you have completed setting your filter conditions. A count of records that meet your created condition appears in the Precount text box.

This screenshot is similar to the previous one, but it shows the 'Precount' field at the bottom of the interface. The 'Precount' field is highlighted with a green box and contains the value '6835'. The 'Finish Condition' button is also highlighted with a green box. The 'Filter Condition' field still shows 'NAICS Equals 2211 - Electric Power Generation, Transmission and Distribution' with the 'AND' operator.

11. (Optional) If you need to update your filter, click  next to the condition that you want to update, make the necessary changes, and then click Update Condition.

12. (Optional) If you want to delete a condition, click  next to the condition that you want to remove.

13. In the Name text box, type a name for your filter.

14. Click Save Filter located at the bottom of the screen. The system saves your created filter.

Note: If you select an existing filter from My Filters, the Save Copy of Filter As option becomes available. Click this button to save a copy of the filter.

15. (Optional) To create another filter, click Create New and then repeat Steps 1 through 11.

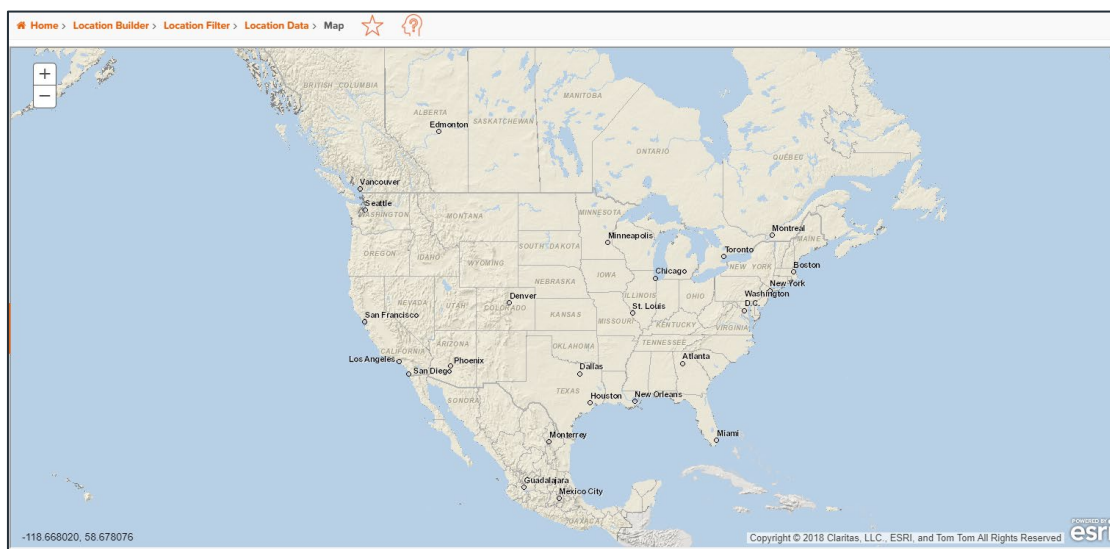
16. Click Next. Click Submit Job.

SUMMARIZED VIEW OF LOCATION DATA

The Location Data screen displays a summarized view of your filtered location data.

VIEW LOCATIONS ON MAP

On the Map screen, verify the filtered locations on the map.



VIEW OUTPUT

When the job is completed, you can do any of the following:

- View the job
- Create a Consumer Concentration or Location Detail report
- View your analysis areas on the interactive map
- Export your analysis areas
- Create another analysis area