

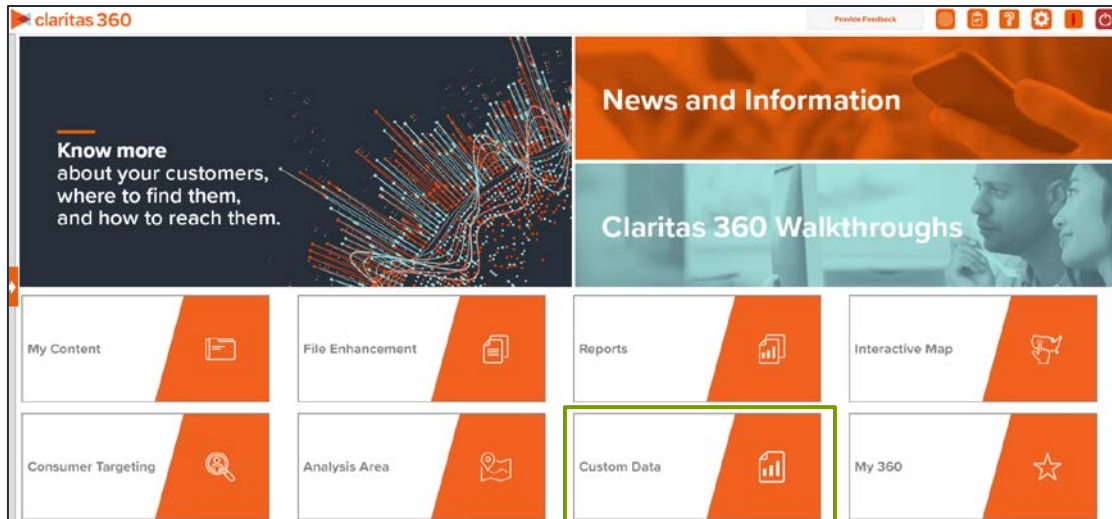
Location Filter

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

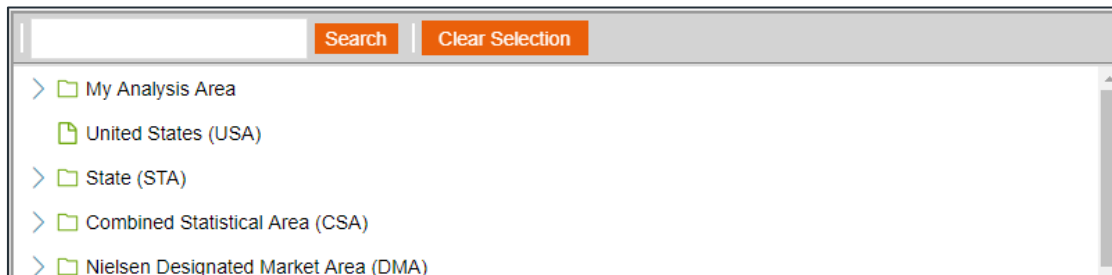
1. From the homepage, click on Custom Data.



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.



- (Optional) To create analysis areas based on the locations included in the filter, click the OFF button next to Create analysis areas from your locations to set it to ON.

Create analysis areas from your locations.
OFF

- 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.

Select a location data source:

Syndicated Data

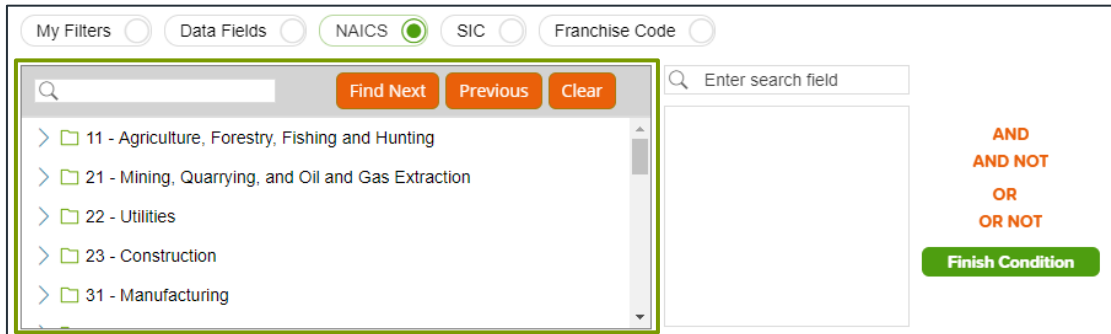
Business-Facts (Point) ▼

Custom Data

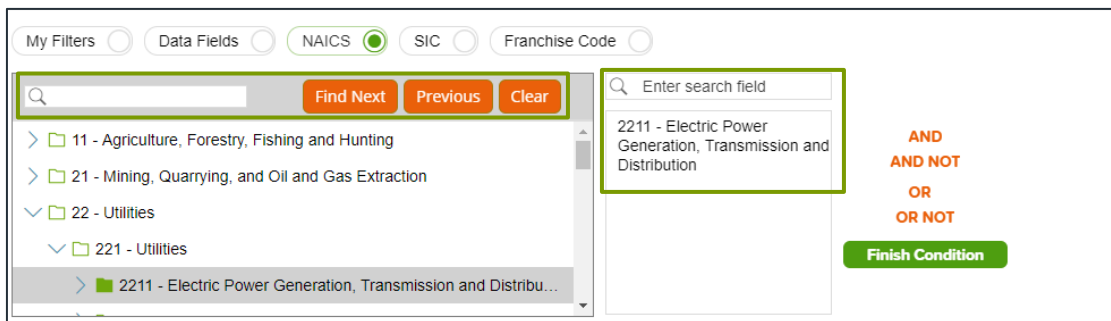
- Click the category of elements or data type that you want to use to create your filter conditions. The options are:

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.
Franchise Code	To include Franchising Code of Conduct codes, a mandatory industry code that applies to the parties to a franchise agreement. Only available when creating a Business-Facts filter.

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

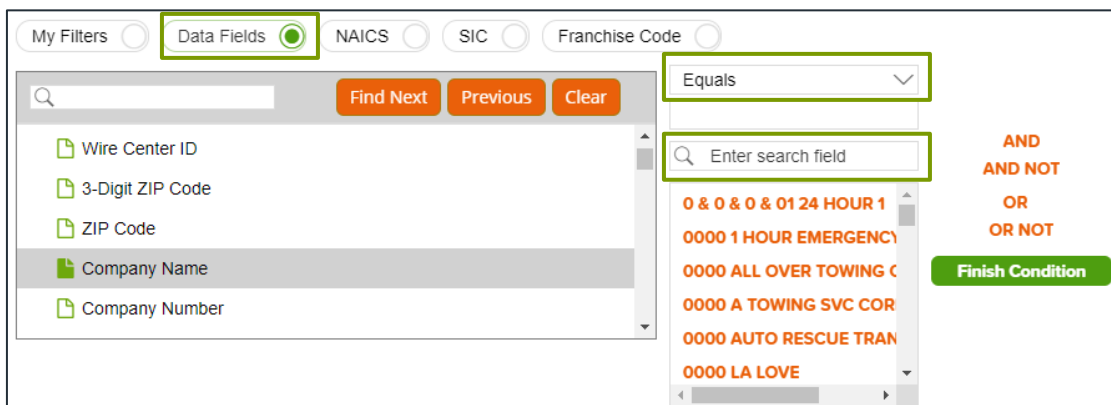


6. Use the search feature or expand a folder to navigate to and select the data element that you want to use. Your selection appears in the box located to the right.



7. (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.

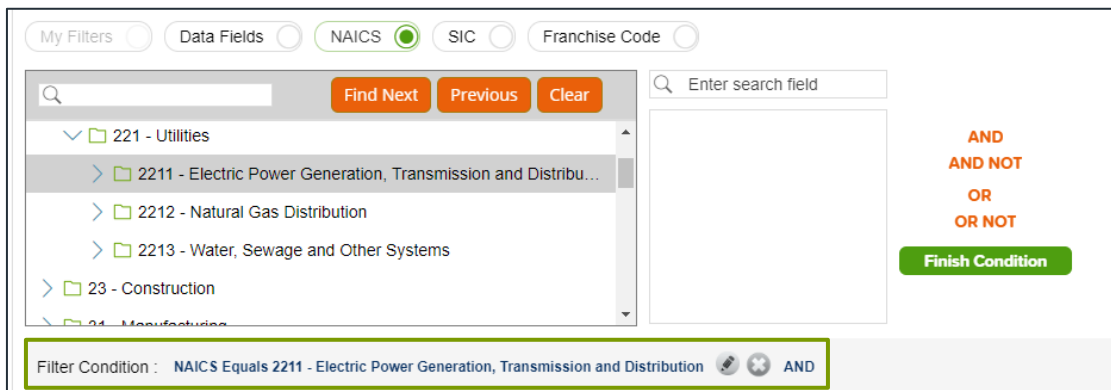
Note: the search feature can be especially helpful when working with fields that contain a large number of different entries (such as Company Name).



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

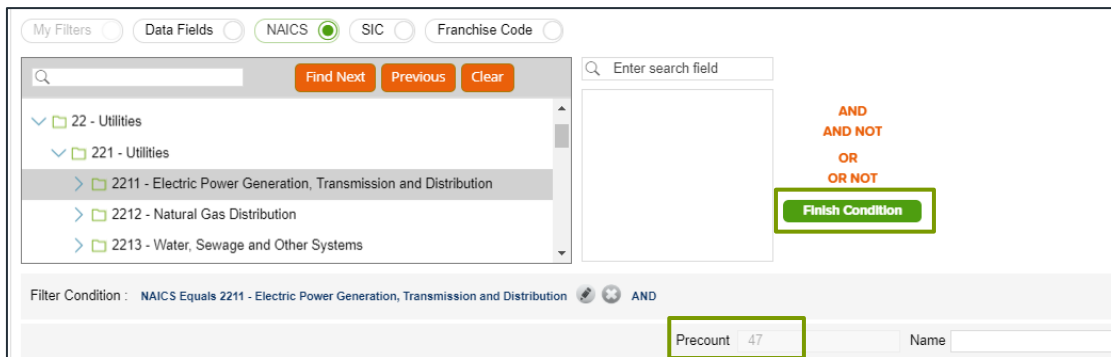
FILTHER CONDITIONS	
FILTER CONDITION	DESCRIPTION
And	To add another condition
And Not	To specify a condition that must not be met
Or	To specify an alternative condition
Or Not	To specify an alternative condition that must not be met


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




10. (Optional) To add conditions, repeat Steps 6 through 9.

11. 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.



12. (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.

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

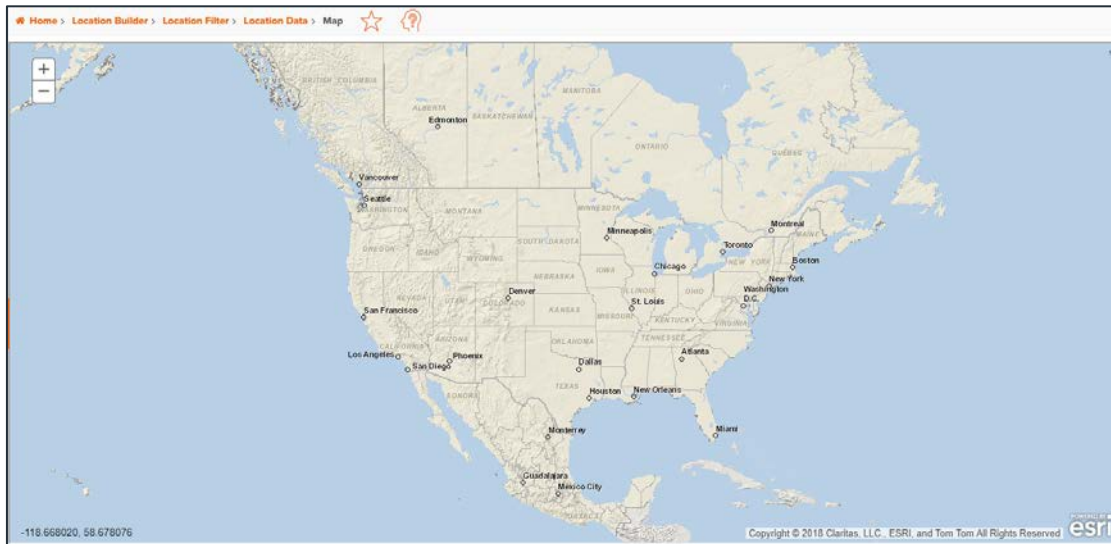
14. In the Name text box, type a name for your filter.
15. Click Save Filter located at the bottom of the screen. The system saves your created filter.
Note: If you select an existing filter from My Filters, the Save Copy of Filter As option becomes available. Click this button to save a copy of the filter.
16. (Optional) To create another filter, click Create New and then repeat Steps 1 through 11.

SUMMARIZED VIEW OF LOCATION DATA

The Location Data screen displays a summarized view of your filtered location data. (Under development)

VIEW LOCATIONS ON MAP

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



CREATE ANALYSIS AREAS (OPTIONAL)

If you selected to create analysis areas around your locations, you'll be prompted to select the analysis area type and corresponding settings.

1. In the Select an Analysis Area Type drop-down list, select the type of analysis area that you want to create. The options are:

ANALYSIS AREA TYPES	
AREA TYPE	DESCRIPTION
Radius	Based on a specified distance, in miles, around a particular location.
Concentric	Based on specified radii, in miles, around a particular location that will create doughnut shaped areas.
Drive Time	Based on the number of minutes (drive time) you can drive from a specific location. Note that the drive time area does not account for traffic.
Drive Distance	Based on the number of miles (drive distance) you can drive from a specific location.
Threshold	Based on a specified value (threshold) of a selected variable (for example, a radius area based on the current-year population threshold of 10,000)
Thiessen	Based on a specified distance, in miles, around multiple locations that will create non-overlapping radii.

2. Based on the selected area type, further define the area details:

ANALYSIS AREAS, ADDITIONAL DETAILS	
AREA TYPE	ADDITIONAL DETAILS NEEDED
Radius	Enter the radius (in miles) from your specified location data that you want to use.
Concentric	Type the radius (in miles) of the inner circle that you want to create around your specified location data in the Inner Radius text box, and then type the radius of the outer circle in the Outer Radius text box.
Drive Time	Enter the drive time (in minutes) from your specified location data that you want to use.
Drive Distance	Enter drive distance (in miles) from your specified location data that you want to use.
Threshold	Specify the variable that will be used for the threshold, the maximum threshold value, the percent tolerance (i.e., the inaccuracy rate used to determine how close the resulting radii are to the specified threshold value), your preferred maximum number of iterations, and the minimum and maximum radius (in miles).
Thiessen	Enter the number of polygons you want to create and the size of each radius (in miles).

3. (Optional) To create your analysis areas based on standard geographies that fall within your selected area, change the Use geographies within the selected area prompt to ON. Additional options will appear.

- a. In the Select a geography level drop-down list, select your desired geography level.
- b. Specify the method by which you want to include the geography. The options are:

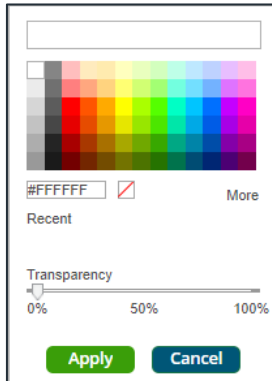
INCLUSION METHODS	
INCLUSION METHOD	DESCRIPTION
Centroid inclusion	Includes geographies with centroids that fall within the perimeter of the area.
Entirely within	Includes geographies that fall completely within the perimeter of the area.
Within or touches	Includes geographies that fall within or touch any part of the perimeter of the area.

- c. By default, the interior boundaries will be shown on the map. To hide the boundaries, change the Show interior boundaries prompt to OFF.
4. (Optional) To define how you want the analysis areas to display on the map, change the Edit the display style of the analysis area prompt to ON. Additional options will appear.

- a. To customize the analysis area border settings, click the button next to Border. When the Border setting options box appears, click to select your desired border color; click and drag the Transparency slider to specify the transparency of the border; and then click Apply.

Note: A transparency of 100% means that there will be no color. 0% means full color.

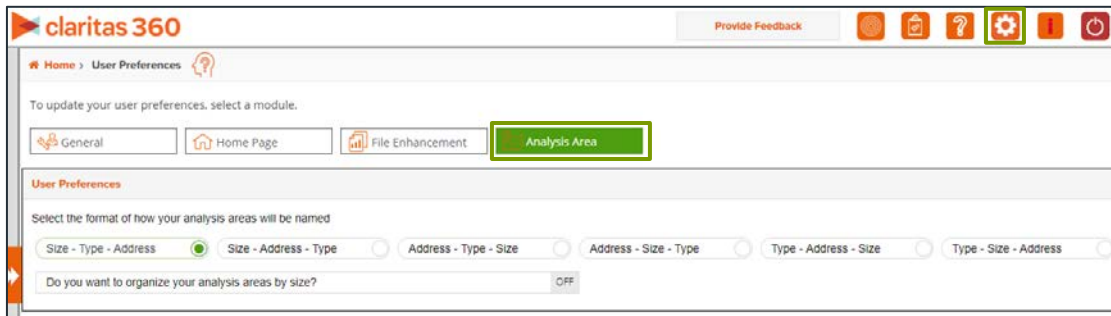
- b. To customize the analysis area fill settings, click the button next to Fill. When the Fill setting options box appears, click to select your desired border color; click and drag the Transparency slider to specify the transparency of your analysis area display; and then click Apply.



5. In the Name text box, the naming convention for your analysis area(s) will be displayed. Click Submit Job.



Note: The naming convention for your analysis areas can be changed in your User Preferences.



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