

# CATEGORICAL MAPPING OF IMPORTED POINT-LEVEL DATA

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You can create Categorical maps to quickly differentiate between different groups of customers. Themes are produced to shade your customer points based on a category within your customer file.

First, you'll need to import your customer file into ENVISION5. You can upload a file of customers with postal code information or coordinates.

There are four steps to the process of importing a customer file:

1. Upload the file
2. Specify the file properties
3. Specify the geocode settings
4. Specify your category field, details below.

For more in depth instructions, please refer to the Importing Customer Files QuickStart located on our community page at <https://community.environicsanalytics.com/hc/en-us>

## 1. Import Additional Fields to Specify Category

In this step you will choose the field you would like to use as your category. Select **Categorical** as your data type.

Categorical indicates that your field contains items that can be grouped together. When building a query these categories will be pre-populated. This allows 'In' and 'Not In' operators in a query.

The screenshot shows a configuration window titled "Import Additional Fields". At the top right, there are two buttons: "All" and "OFF". Below this, there are five rows of fields, each with a toggle switch:

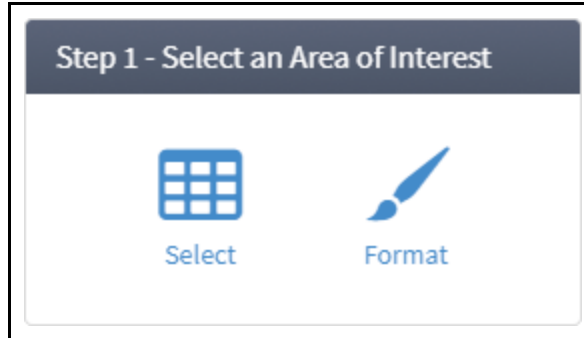
- UniqueID: OFF
- City: OFF
- CustomerCount: OFF
- Member Type: ON
- Postal Code: OFF

At the bottom, there is a dropdown menu currently set to "Categorical".

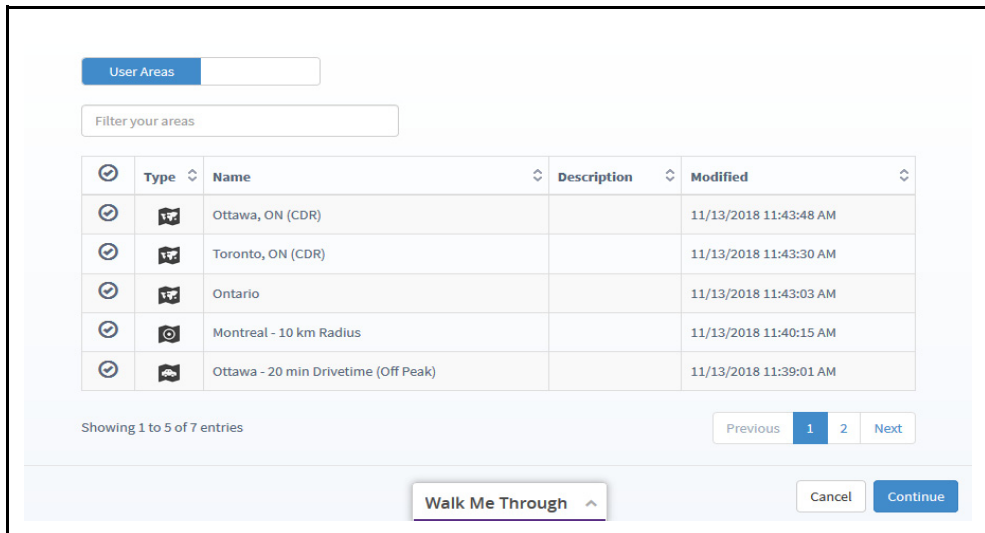
5. Click **Next Step**.

## 2. Mapping

1. In the Side Panel, click **Mapping** and then **Customers**.
2. Once the map has finished loading, in the **Step 1** box, click **Select**.

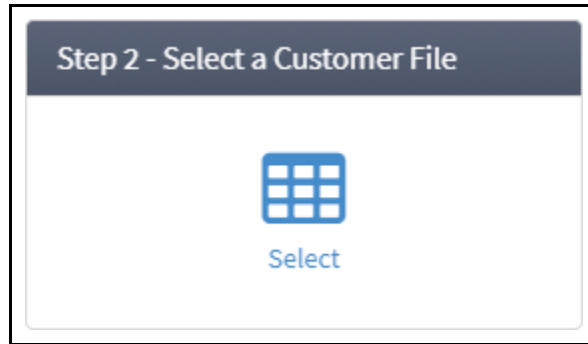


3. From the list, select an area by clicking the checkmark next to it. Use an area that contains enough customers to create a meaningful map.

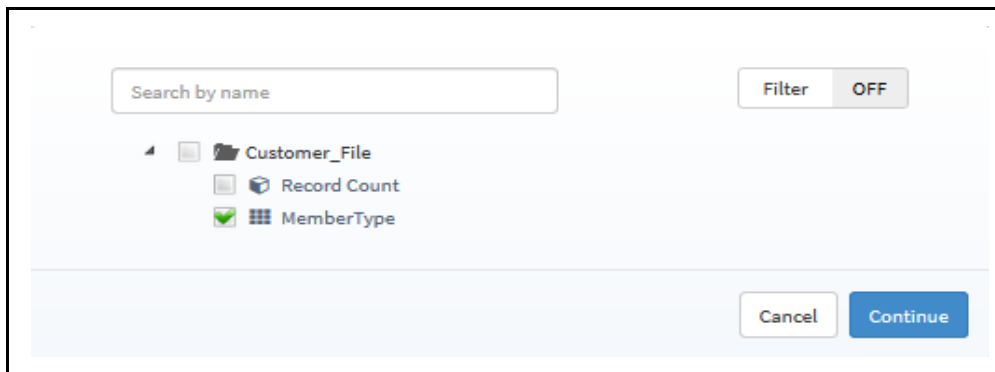


4. Click **Continue**. The map will redraw to centre on the area selected.

5. In the **Step 2** box, click **Select**.



6. Expand the customer file and select the name of the category field you specified when you imported the customer file.




**Tip:** Turn the Filter switch **ON** to either use an existing customer filter or create a new one. For more information about creating customer filters, see the QuickStart entitled: *Creating and Editing Customer Filters* located on our community page at <https://community.environicsanalytics.com/hc/en-us>

7. Click **Continue**.

8. In the **Step 2** box, make your selection.

Step 2 - Select a Customer File



Select

Selected Variable

Category

Map Type

Map Category

Renderer Type

Point Map

Scope

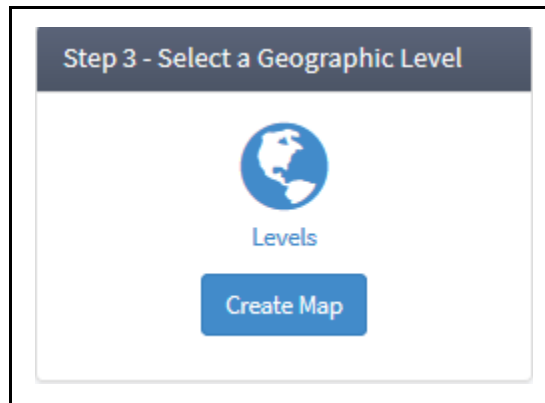
Area(s) of Interest

National

- a. Map Category is selected because the thematic map is based on a chosen category.
- b. Point map is selected because the imported points are used in the thematic map.

- c. The Scope refers to the extent of the map being created. If you wish to constrain your thematic to just be within your area of interest, then you can choose Area(s) of Interest. If you wish to have the thematic map include values held in the entire country, then choose National. The colour theme will go beyond the area(s) of interest.

9. In the **Step 3** box, the geographic level will already be selected.



10. Click **Create Map**.

The map draws, shading your selected customers by category found within the customer file.

11. In **Step 4**, change the ranges, colours, and overlay options.

### Step 4 - Advanced Options





#### Classification and Fill

**Method** Custom

**Classes#** 4

**Colour Ramp** Set1

**Colour** **Values** Labels

	#e41a1c	drop-in	▼
	#377eb8	monthly	▼
	#4daf4a	yearly	▼
	#984ea3	<Other>	▼

**Size** 20

**Opacity**

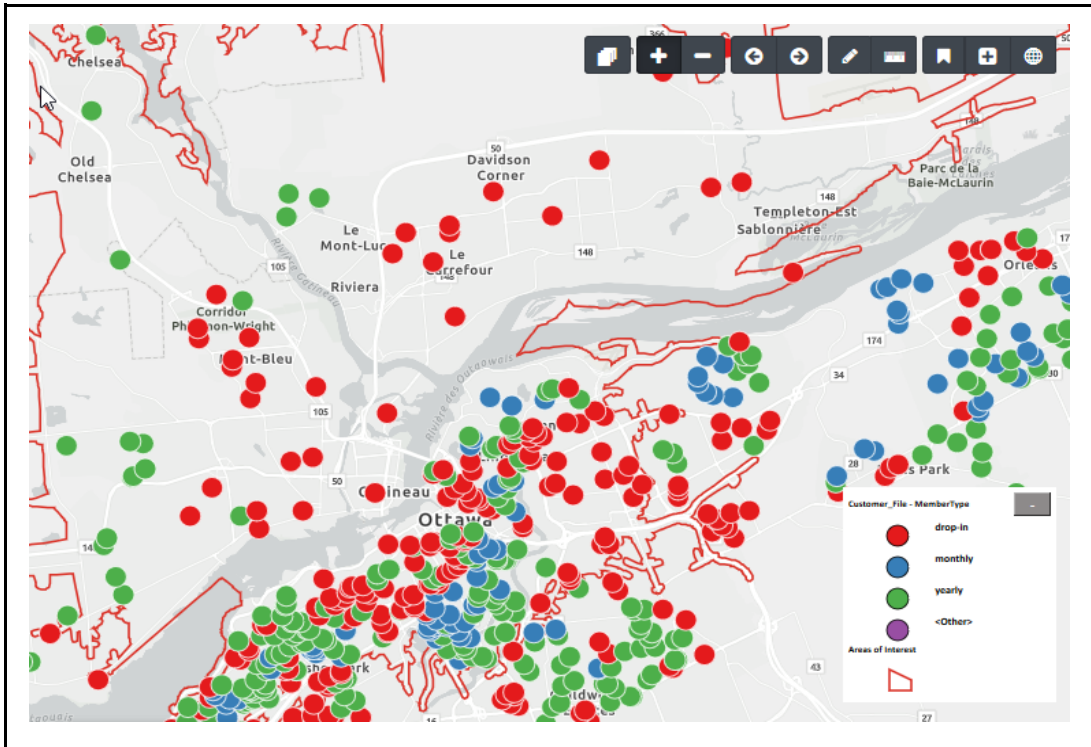
#### Outline

**Colour**

**Width**

**Create Map**

12. Click **Create Map**.





**13.** To change the output options, see the **Step 5** box. Pick an output format from the **Format** list and click **Print Map**.

The image shows a dialog box titled "Step 5 - Printing Option". It contains the following elements:

- Title:** A text input field with the placeholder text "Your Map Title".
- Subtitle:** A text input field with the placeholder text "Your Map Subtitle".
- Layout:** A dropdown menu with the text "Select a layout:" and a downward arrow.
- Format:** A dropdown menu with the text "PDF" and a downward arrow.
- Print Map:** A blue button with the text "Print Map".

Your map is available in the **Results** list.