

# USING THE LOCATION LISTS TOOL AND CREATING FILTERS

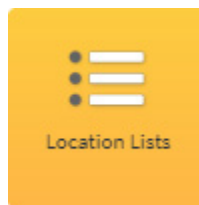
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The Location Lists tool in ENVISION5 helps you answer business questions like:

- How many coffee shops are in my areas of interest?
- What companies have over 100 employees?
- Where are my competitors located?

## 1. Set up the Report

1. Find the **Location Lists** tool on the ENVISION5 homepage using the search filter or by scrolling through the list of tools. Click the Play button to launch the tool.








2. Once in the tool, select one or more Trade Areas, by clicking on the check mark.

**Tip:** If the area(s) is not on the list, it will need to be created first. If area(s) was already created and is not on this list, it may be in a different Workspace.

Select one or more Trade Areas ▾

Filter your trade areas

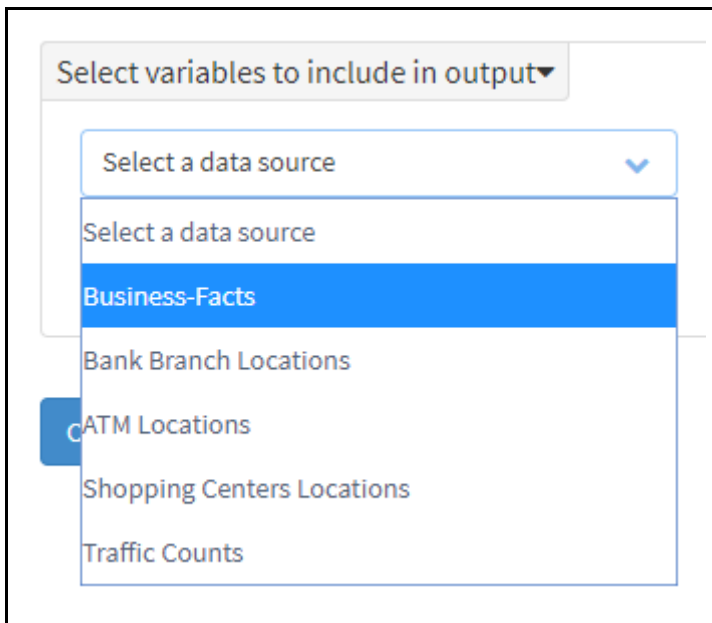
<input type="checkbox"/>	Type ▾	Name
<input type="checkbox"/>		Buffalo, NY
<input checked="" type="checkbox"/>		Massachusetts
<input type="checkbox"/>		Washington-Arlington-Alexandria, DC-VA-MD-WV (Metro)
<input checked="" type="checkbox"/>		east Knoxville - 15 min Drivetime (Heavy Traffic)
<input type="checkbox"/>		east Knoxville - 5 min Drivetime (Heavy Traffic)

Showing 1 to 5 of 13 entries - 2 selected

## 2. Create a Filter Using the Business-Facts Database

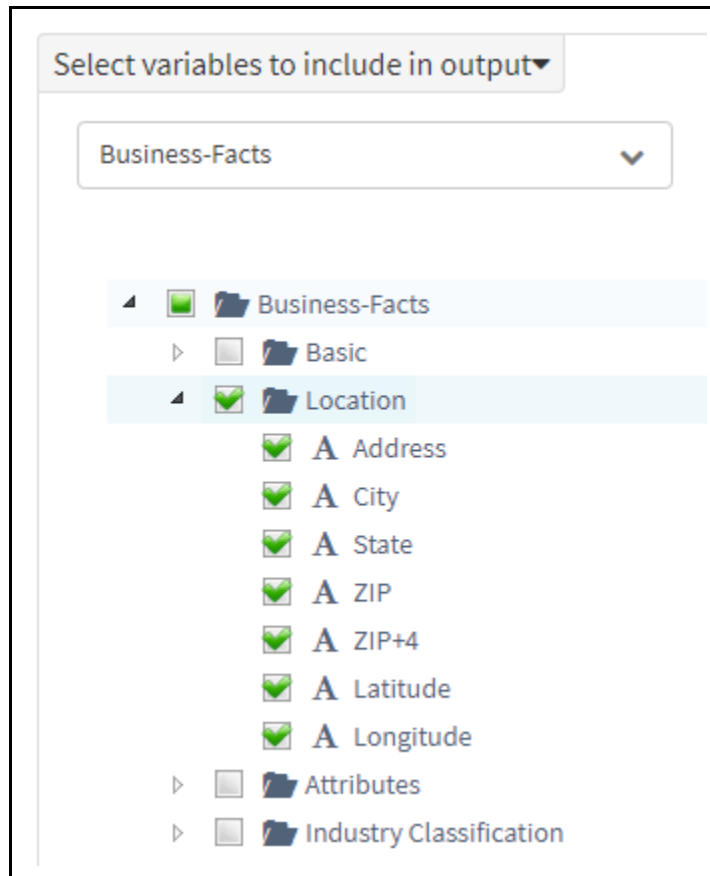
1. Select the Business-Facts database from the list.

**Note:** The list will show only the datasets which your organization licenses from Environics Analytics.



2. Review the variable list and select any variables you require by clicking the box next to them.

**Tip:** You can select a group of ‘child’ variables by selecting the entire ‘parent’ category.



## 2-1. Specify the Filter Parameters

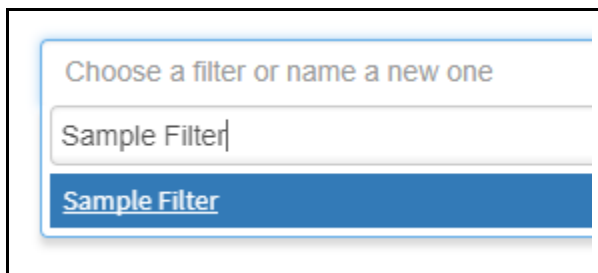
You can create a filter here in order to refine the results. For example, you may wish to focus on a specific NAICS code. These filters are optional and do not need to be used in order to run a Location Lists report.

1. Turn on the **Filter** option if you wish to filter your results using a query.



**Note:** In the **Query Builder** section, you can create a new filter or work with an existing one. This example will create a new one.

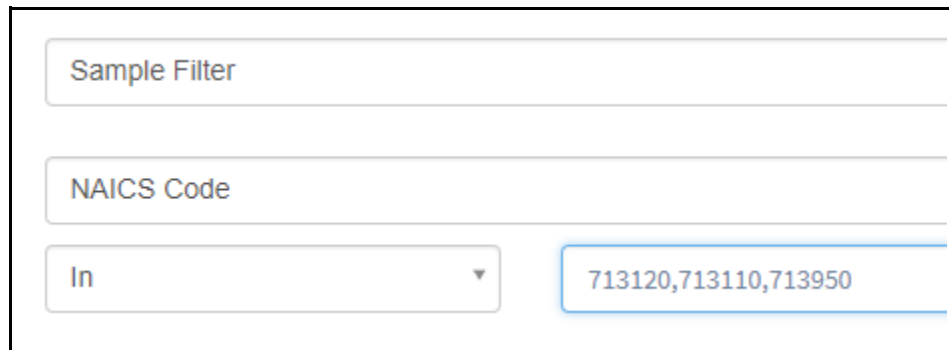
2. Give your new filter a name. Be sure to press **Tab** or **Enter** in order to save the name.



3. Choose a field.
4. Choose an operator.

**Tip:** The selected field dictates the operators that are available. The operators will be different if the field is numeric, or if the field is text, or if the field is categorical, and so on.

5. Enter the value you wish.



The screenshot shows a filter creation interface with three input fields. The first field is labeled 'Sample Filter'. The second field is labeled 'NAICS Code'. The third field is a dropdown menu labeled 'In', which is currently open and displaying a list of values: '713120,713110,713950'.

**Caution:** When querying on multiple text values, separate them only with a comma—do not use a space. Quotes are not necessary.

6. Click **Add to Query**.
7. Repeat as necessary for any other components you wish to add.
8. Click **Save Filter**.

Your filter is now available to be used in this report. You can also use the same filter to show the point data on a map.

## 2-2. Run the Report

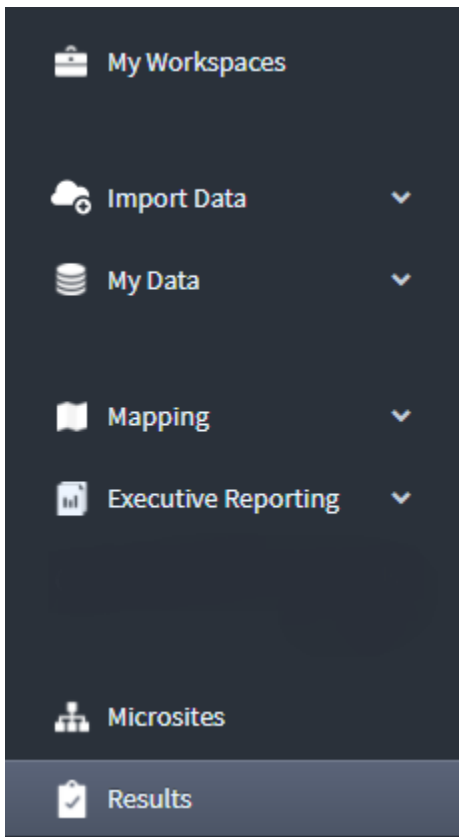
1. Click **Create Report**.



Create Report

**Tip:** If you want a report from each of the data sources that you have available, then select one data source, click **Create Report**, and before navigating to the **Results** page, choose a different data source, and click **Create Report** again. You can repeat this as many times as you have datasets.

2. Once you are finished running the report, click **Results** in the side panel.



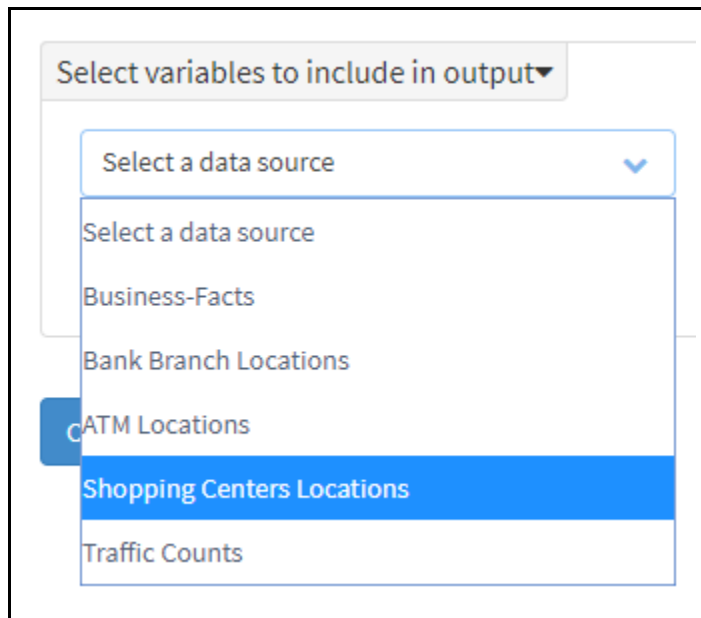
3. Click the name of the report to download it. Or click the gear icon and choose **Download**.

	Type	Name	Details	Requested	
		LocationWare	Areas: 2 Dataset: ATM Locations 2016 Q4	5/31/2017 1:56:10 PM	

### 3. Create a Filter Using the Shopping Centers Database

1. Select the Shopping Centers database from the list.

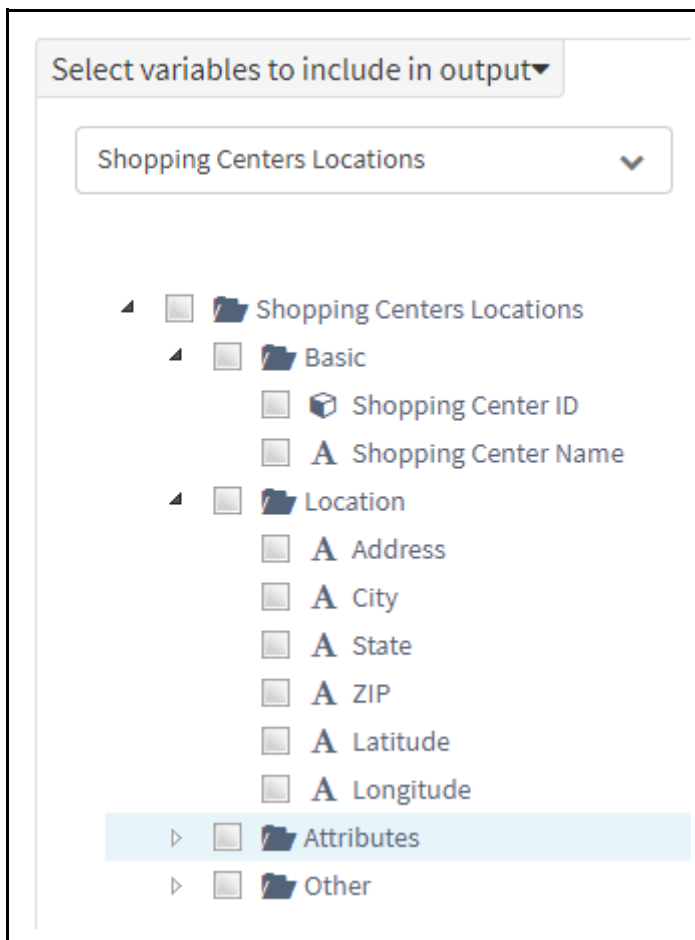
**Note:** The list will show only the datasets which your organization licenses from Environics Analytics.





2. Review the variable list and select any variables you require by clicking the box next to them.

**Tip:** You can select a group of ‘child’ variables by selecting the entire ‘parent’ category.



### 3-1. Specify the Filter Parameters

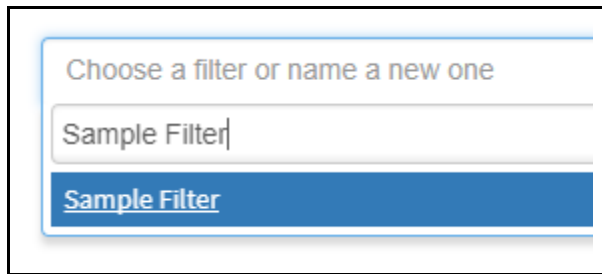
You can create a filter here in order to refine the results. For example, you may wish to focus on a specific type of shopping center. These filters are optional and do not need to be used in order to run a Location Lists report.

1. Turn on the **Filter** option if you wish to filter your results using a query.



**Note:** In the **Query Builder** section, you can create a new filter or work with an existing one. This example will create a new one.

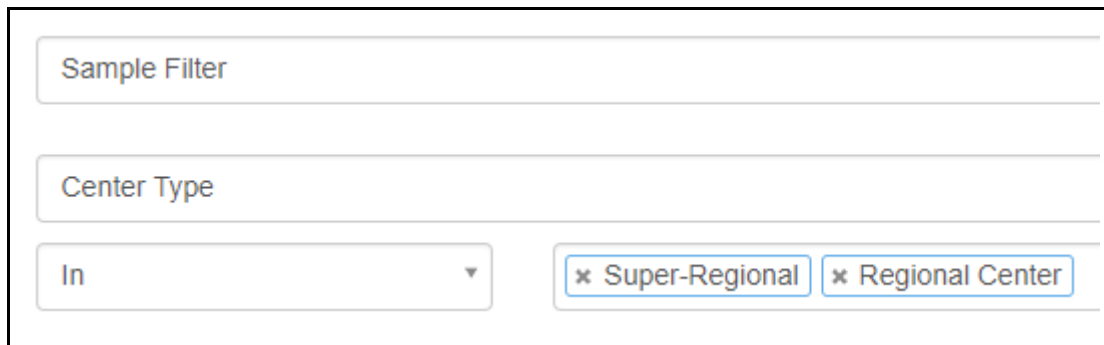
2. Give your new filter a name. Be sure to press **Tab** or **Enter** in order to save the name.



3. Choose a field.
4. Choose an operator.

**Tip:** The selected field dictates the operators that are available. The operators will be different if the field is numeric, or if the field is text, or if the field is categorical, and so on.

5. Enter the value you wish.



The screenshot shows a filter creation interface with three input fields. The first field is labeled "Sample Filter". The second field is labeled "Center Type". The third field is labeled "In" and has a dropdown arrow. To the right of the "In" field are two buttons: "x Super-Regional" and "x Regional Center".


**Tip:** When querying on category values, ENVISION5 will pre-populate the categories for you.

6. Click **Add to Query**.
7. Repeat as necessary for any other components you wish to add.
8. Click **Save Filter**.

Your filter is now available to be used in this report. You can also use the same filter to show the point data on a map.

### 3-2. Run the Report

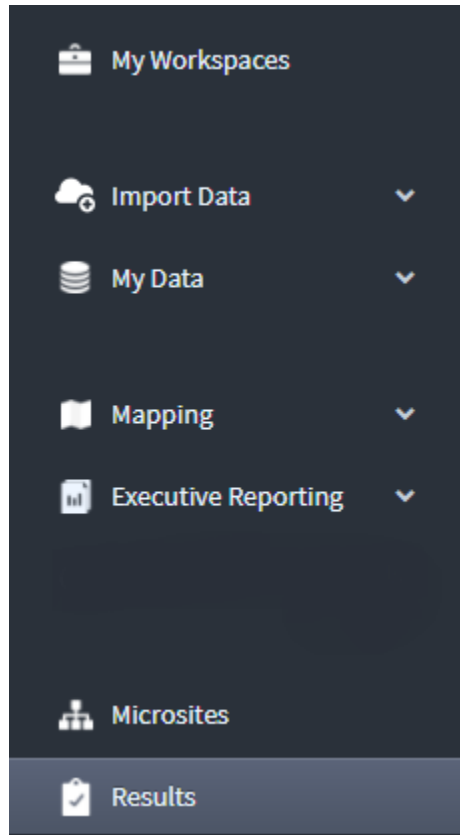
1. Click **Create Report**.





Create Report

**Tip:** If you want a report from each of the data sources that you have available, then select one data source, click **Create Report**, and before navigating to the **Results** page, choose a different data source, and click **Create Report** again. You can repeat this as many times as you have datasets.

2. Once you are finished running the report, click **Results** in the side panel.



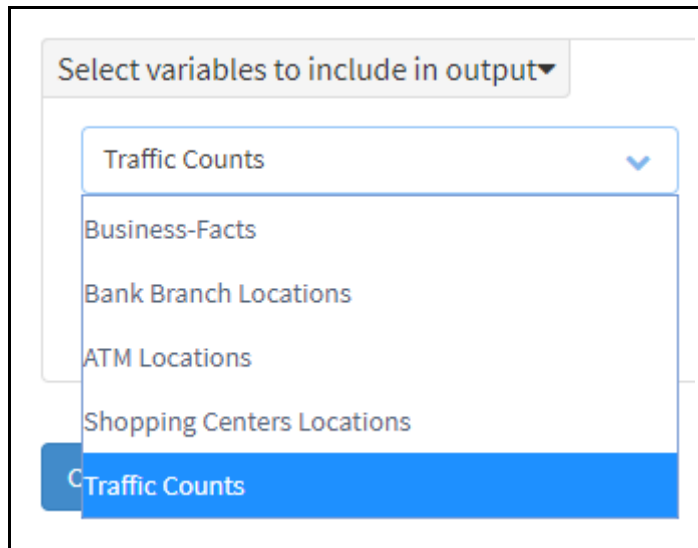
3. Click the name of the report to download it. Or click the gear icon and choose **Download**.

<input checked="" type="checkbox"/>	Type	Name	Details	Requested	
<input checked="" type="checkbox"/>		LocationWare	Area: Albany-Schenectady-Troy, NY (CBSA) Dataset: Shopping Centers Locations 2017 Q1 Filter Name: Sample Filter Filter: WHERE [CTRCLASS] In (Super-Regional, Regional Center)	8/9/2017 1:38:34 PM	

## 4. Create a Filter Using the Traffic Counts Database

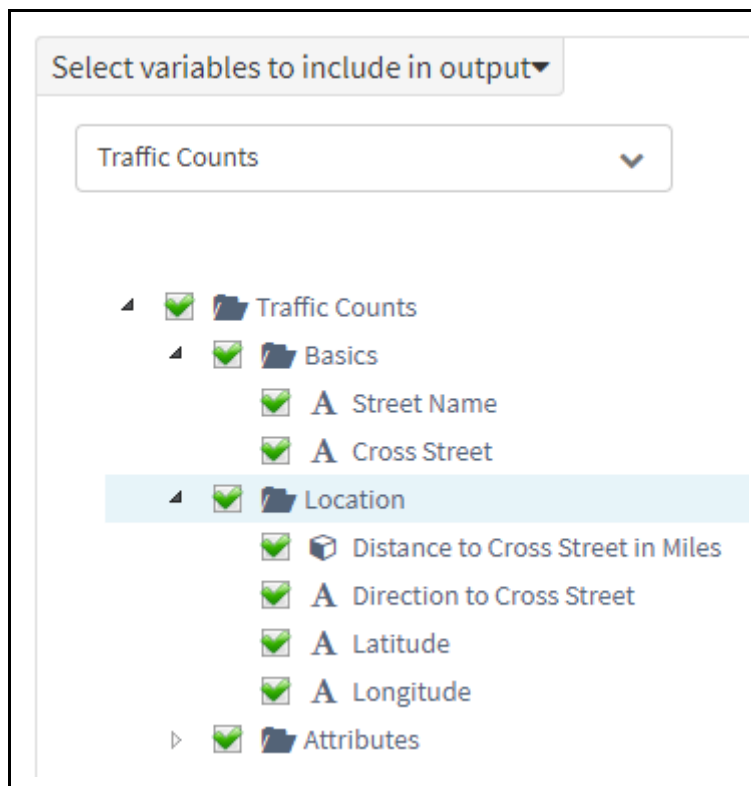
1. Select the Traffic Counts database from the list.

**Note:** The list will show only the datasets which your organization licenses from Environics Analytics.



2. Review the variable list and select any variables you require by clicking the box next to them.

**Tip:** You can select a group of ‘child’ variables by selecting the entire ‘parent’ category.



#### 4-1. Specify the Filter Parameters

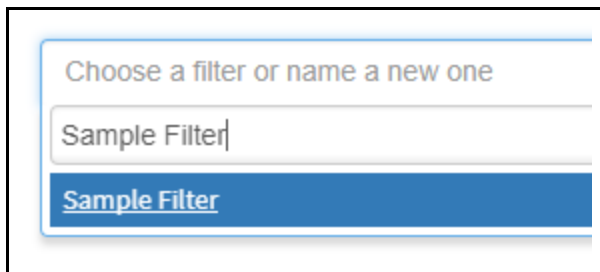
You can create a filter here in order to refine the results. For example, you may wish to focus on intersections that have a traffic count higher than a given value. These filters are optional and do not need to be used in order to run a Location Lists report.

1. Turn on the **Filter** option if you wish to filter your results using a query.



**Note:** In the **Query Builder** section, you can create a new filter or work with an existing one. This example will create a new one.

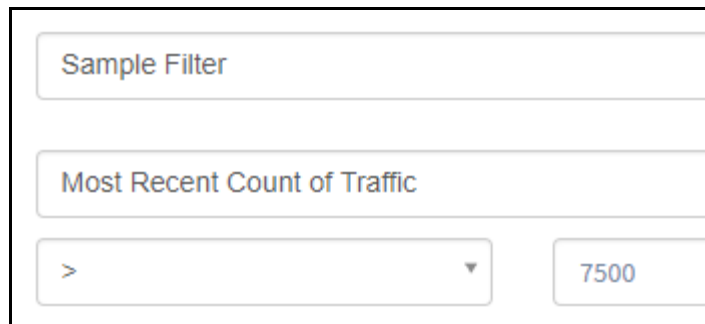
2. Give your new filter a name. Be sure to press **Tab** or **Enter** in order to save the name.



3. Choose a field.
4. Choose an operator.

**Tip:** The selected field dictates the operators that are available. The operators will be different if the field is numeric, or if the field is text, or if the field is categorical, and so on.

5. Enter the value you wish.




The screenshot shows a filter configuration interface. It consists of three main sections: a text input field containing 'Sample Filter', a dropdown menu with 'Most Recent Count of Traffic' selected, and a comparison operator '>' followed by a value input field containing '7500'.

6. Click **Add to Query**.
7. Repeat as necessary for any other components you wish to add.
8. Click **Save Filter**.

Your filter is now available to be used in this report. You can also use the same filter to show the point data on a map.

## 4-2. Run the Report

1. Click **Create Report**.

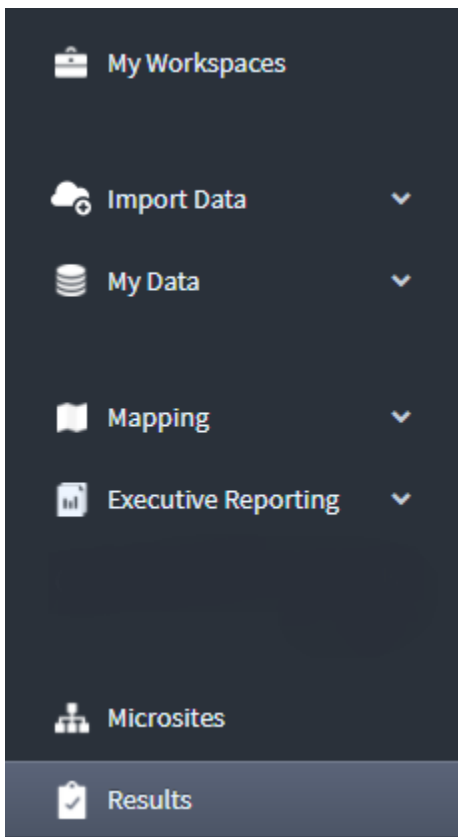


Create Report

**Tip:** If you want a report from each of the data sources that you have available, then select one data source, click **Create Report**, and before navigating to the **Results** page, choose a different data source, and click **Create Report** again. You can repeat this as many times as you have datasets.



2. Once you are finished running the report, click **Results** in the side panel.



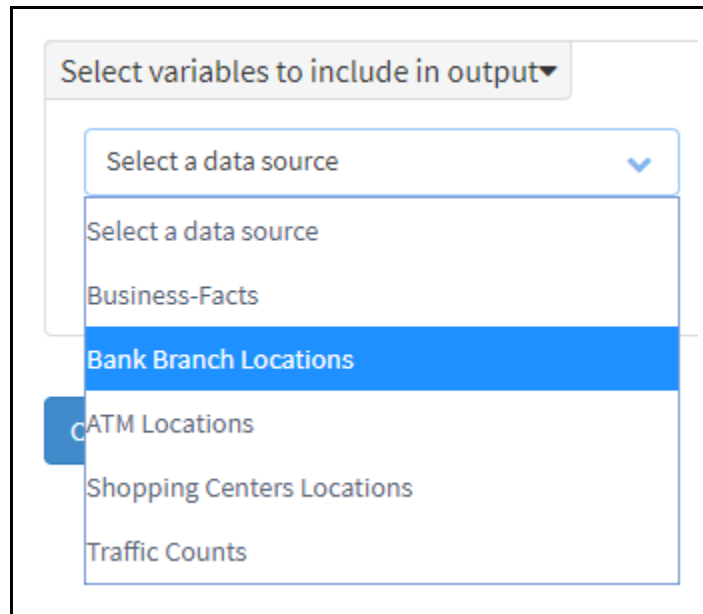
3. Click the name of the report to download it. Or click the gear icon and choose **Download**.

	Type	Name	Details	Requested	
		LocationWare	Area: Albany-Schenectady-Troy, NY (CBSA) Dataset: Traffic Counts 2017 Q2 Filter Name: Sample Filter Filter: WHERE [TRAFFIC1] > 7500	8/9/2017 2:28:40 PM	

## 5. Create a Filter Using the Bank Branch Locations Database

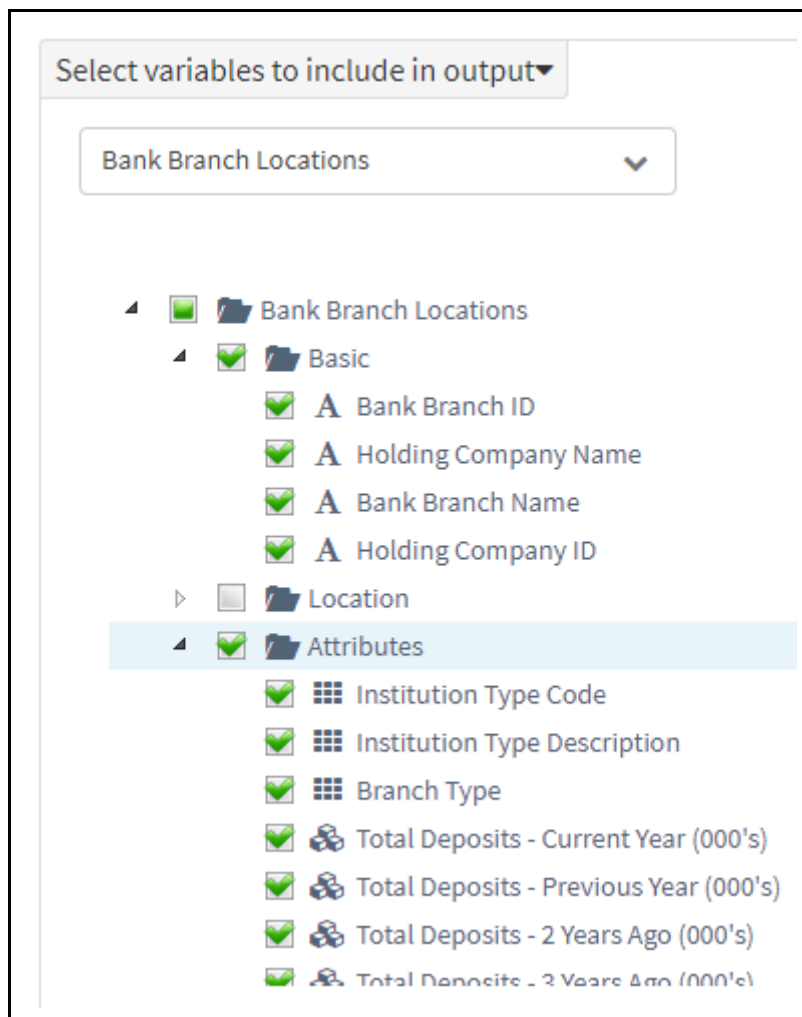
1. Select the Bank Branch Locations database from the list.

**Note:** The list will show only the datasets which your organization licenses from Environics Analytics.



2. Review the variable list and select any variables you require by clicking the box next to them.

**Tip:** You can select a group of 'child' variables by selecting the entire 'parent' category.



## 5-1. Specify the Filter Parameters

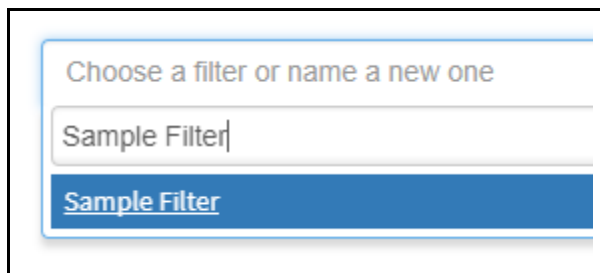
You can create a filter here in order to refine the results. For example, you may wish to focus on banks that have deposits greater than a certain amount. These filters are optional and do not need to be used in order to run a Location Lists report.

1. Turn on the **Filter** option if you wish to filter your results using a query.



**Note:** In the **Query Builder** section, you can create a new filter or work with an existing one. This example will create a new one.

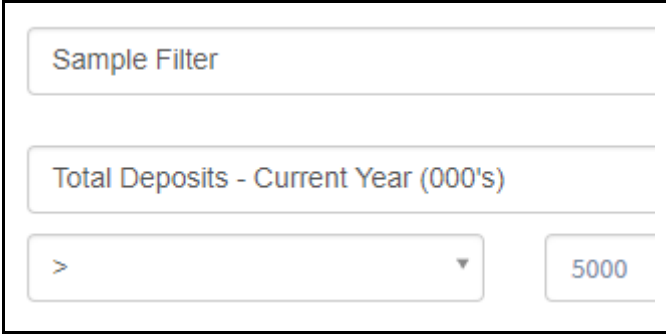
2. Give your new filter a name. Be sure to press **Tab** or **Enter** in order to save the name.



3. Choose a field.
4. Choose an operator.

**Tip:** The selected field dictates the operators that are available. The operators will be different if the field is numeric, or if the field is text, or if the field is categorical, and so on.

5. Enter the value you wish.




The image shows a filter configuration interface. It consists of three main components: a text input field at the top containing the text "Sample Filter"; a dropdown menu in the middle containing the text "Total Deposits - Current Year (000's)"; and a comparison operator dropdown at the bottom left containing the text ">". To the right of the comparison operator dropdown is a value input field containing the text "5000".

6. Click **Add to Query**.
7. Repeat as necessary for any other components you wish to add.
8. Click **Save Filter**.

Your filter is now available to be used in this report. You can also use the same filter to show the point data on a map.

## 5-2. Run the Report

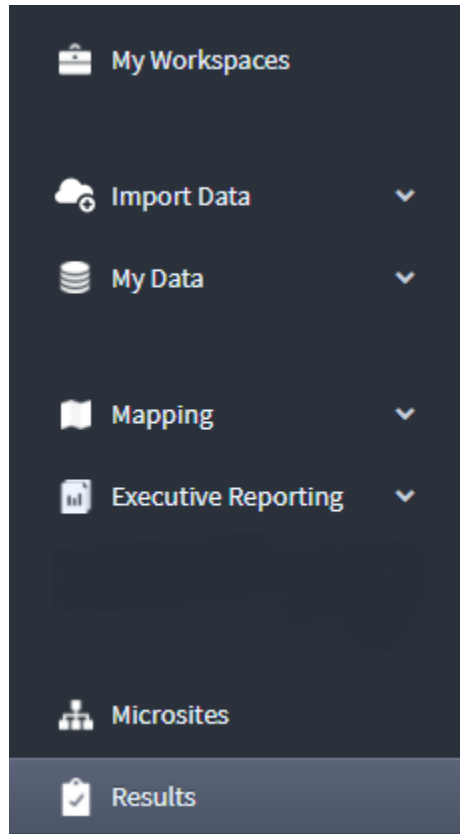
1. Click **Create Report**.





A blue rectangular button with the text "Create Report" in white.

**Tip:** If you want a report from each of the data sources that you have available, then select one data source, click **Create Report**, and before navigating to the **Results** page, choose a different data source, and click **Create Report** again. You can repeat this as many times as you have datasets.

2. Once you are finished running the report, click **Results** in the side panel.



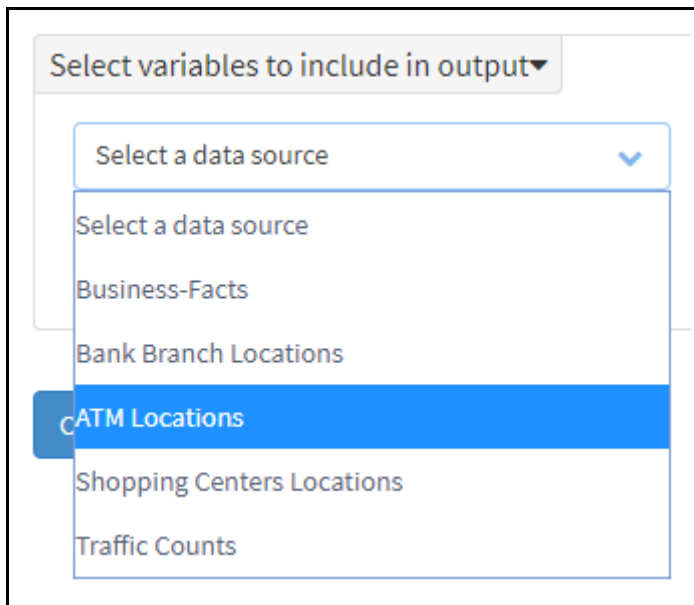
3. Click the name of the report to download it. Or click the gear icon and choose **Download**.

✓	Type ▾	Name ▾	Details ▾	Requested ▾	
✓		LocationWare	Area: <i>Albany-Schenectady-Troy, NY (CBSA)</i> Dataset: <i>Bank Branch Locations 2017 Q1</i> Filter Name: <i>Sample Filter</i> Filter: <i>WHERE [TOTDEP_CY] &gt; 5000</i>	8/9/2017 3:35:57 PM	

## 6. Create a Filter Using the ATM Locations Database

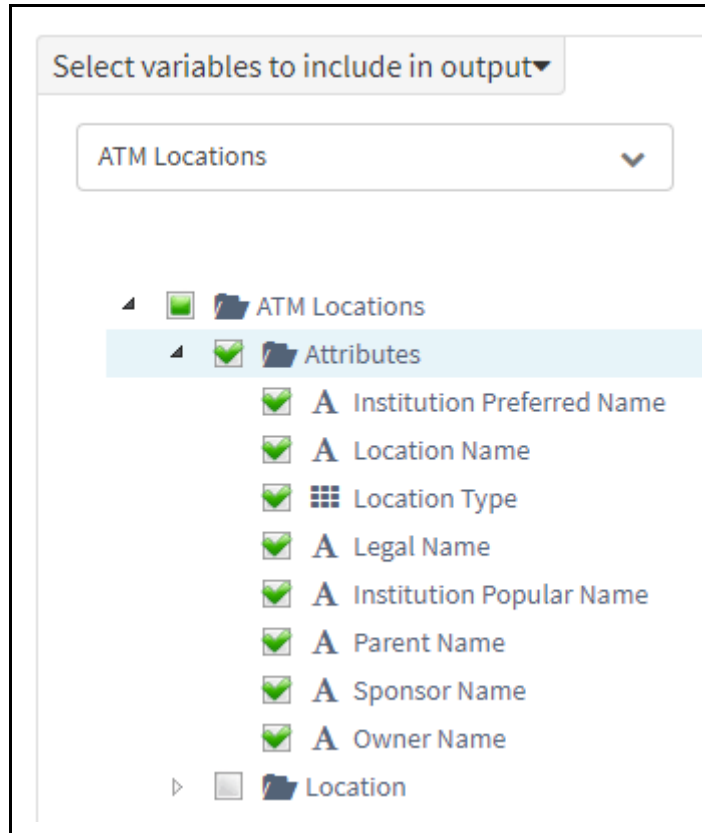
1. Select the ATM Locations database from the list.

**Note:** The list will show only the datasets which your organization licenses from Environics Analytics.



2. Review the variable list and select any variables you require by clicking the box next to them.

**Tip:** You can select a group of ‘child’ variables by selecting the entire ‘parent’ category.



## 6-1. Specify the Filter Parameters

You can create a filter here in order to refine the results. For example, you may wish to focus on a specific bank. These filters are optional and do not need to be used in order to run a Location Lists report.

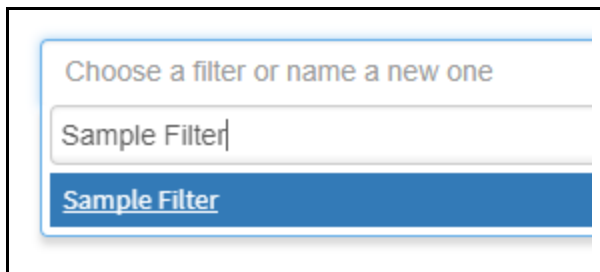


1. Turn on the **Filter** option if you wish to filter your results using a query.



**Note:** In the **Query Builder** section, you can create a new filter or work with an existing one. This example will create a new one.

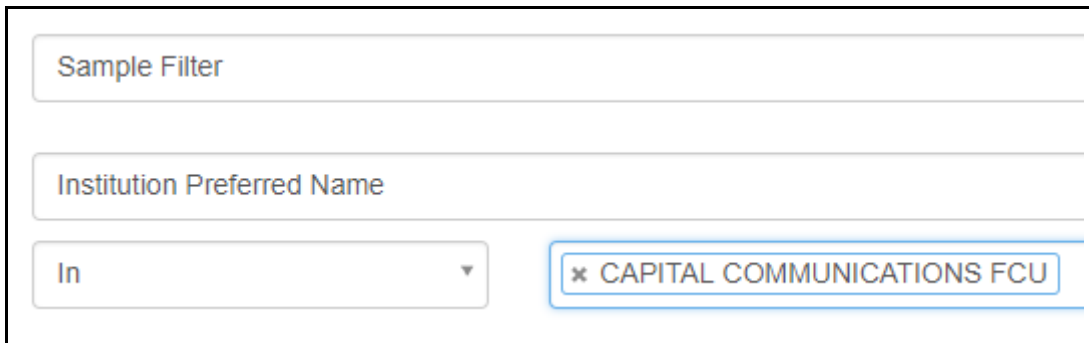
2. Give your new filter a name. Be sure to press **Tab** or **Enter** in order to save the name.



3. Choose a field.
4. Choose an operator.

**Tip:** The selected field dictates the operators that are available. The operators will be different if the field is numeric, or if the field is text, or if the field is categorical, and so on.

5. Enter the value you wish.




**Tip:** When querying on category values, ENVISION5 pre-populates the categories for you.

6. Click **Add to Query**.
7. Repeat as necessary for any other components you wish to add.
8. Click **Save Filter**.

Your filter is now available to be used in this report. You can also use the same filter to show the point data on a map.

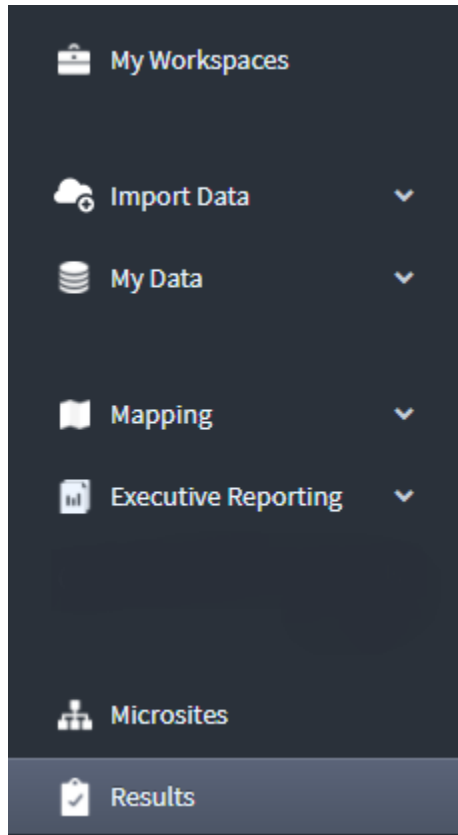
## 6-2. Run the Report

1. Click **Create Report**.









A blue rectangular button with rounded corners containing the text "Create Report" in white.

**Tip:** If you want a report from each of the data sources that you have available, then select one data source, click **Create Report**, and before navigating to the **Results** page, choose a different data source, and click **Create Report** again. You can repeat this as many times as you have datasets.

2. Once you are finished running the report, click **Results** in the side panel.



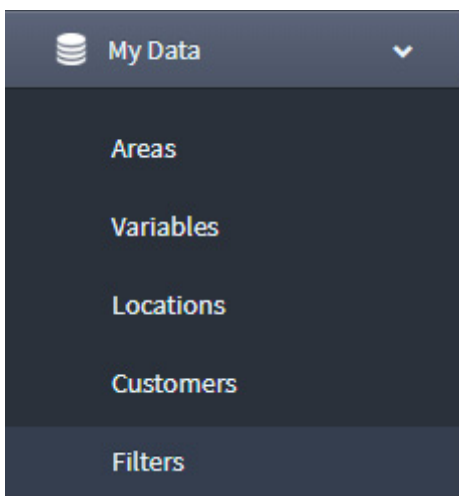
3. Click the name of the report to download it. Or click the gear icon and choose **Download**.

	Type 	Name 	Details 	Requested 	
		LocationWare	Area: <i>Albany-Schenectady-Troy, NY (CBSA)</i> Dataset: <i>ATM Locations 2017 Q1</i> Filter Name: <i>Sample Filter</i> Filter: <i>WHERE [INST_PRFLM] In (CAPITAL COMMUNICATIONS FCU)</i>	8/9/2017 3:50:44 PM	

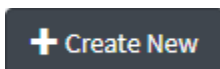
## 7. Create a Filter Outside of the Location Lists Tool

You can create a Location filter outside of the Location Lists tool, and still use it when running that tool.

1. In the side panel, click **My Data** and then **Filters**.



2. Click **Create New**.



3. Enter a **Name** for the filter.
4. In the **Filter Type** list, choose **Location**.
5. In the **Data Source** list, choose the database to which you will apply this filter.

6. Choose whether to make it **Available in all Workspaces** or not.

Please fill in the following information. ✕

**Name**

**Filter type**

**Data Source**

**Available in all Workspaces**

**Create**

7. Click **Create**. Your new filter is added to the list.
8. Click the name of the filter you just created.

9. Use the **Query Builder** section to create the structure of the filter using the steps as outlined in any of the examples above.

The screenshot shows the 'Query Builder' interface. At the top, the title 'Query Builder' is displayed. Below it, there is a search field containing the text 'City'. To the right of this field are an 'x' icon and a dropdown arrow. Below the search field is an equals sign (=) in a dropdown menu. To the right of the equals sign is a text input field containing the word 'Springfield'. At the bottom right of the interface is a blue button labeled 'Add to Query'.

10. When you have finished building the query, click **Add to Query**.
11. Click **Save Changes**.

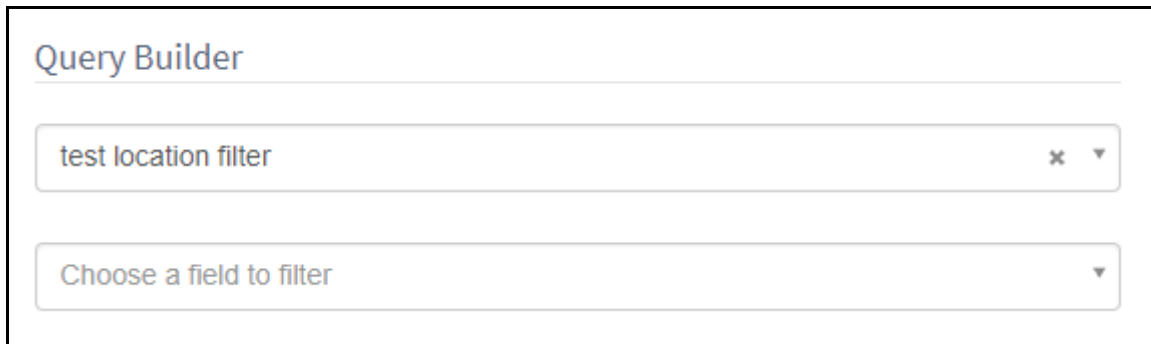
Save changes

12. Launch the **Location Lists** tool.
13. Select the trade area(s) you wish you use.
14. Select the database you used to build your filter.
15. Change the **Filter** toggle from **Off** to **On**.

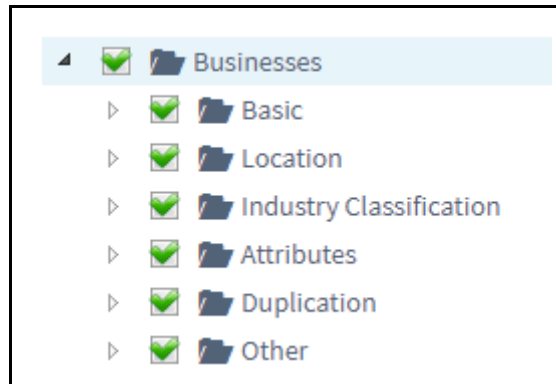
ON Filter

16. In the **Query Builder** section, select the filter you just created from the list of filters.

**Note:** You do not need to specify a field or even click Add to Query.



17. Select the variables you require.



18. Click **Create Report**.



The report will be available in the Results list when it is complete.