

IMPORTING LOCATIONS USING ADDRESS INFORMATION

ENVISION allows you to import location files, using either coordinates (that is, longitude and latitude) or address information. Examples of location files could be store or branch or dealer locations.

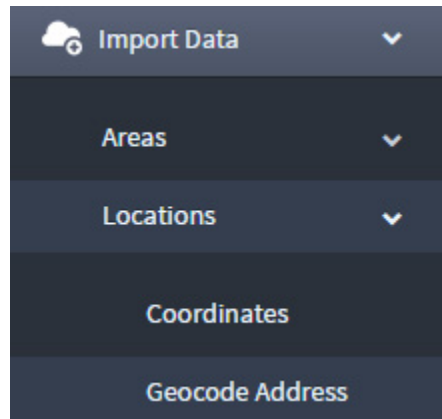
There are 4 steps in the process of importing locations by geocoding a list of addresses:

1. Upload the file
2. Specify the location properties
3. Specify the address information
4. Specify any additional fields (optional)

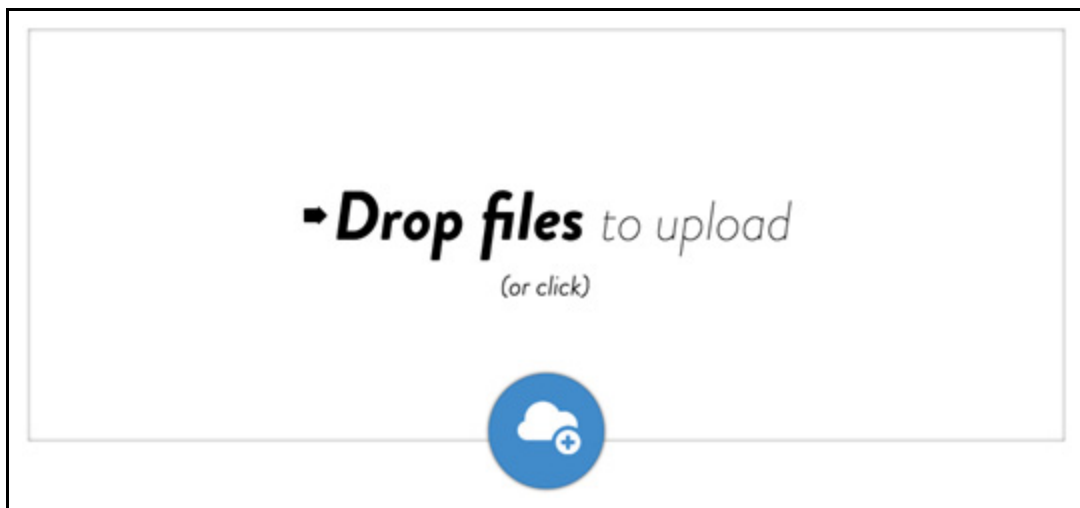
To import a location file into ENVISION using address information, the file needs complete address information for each location record.

1. Upload File

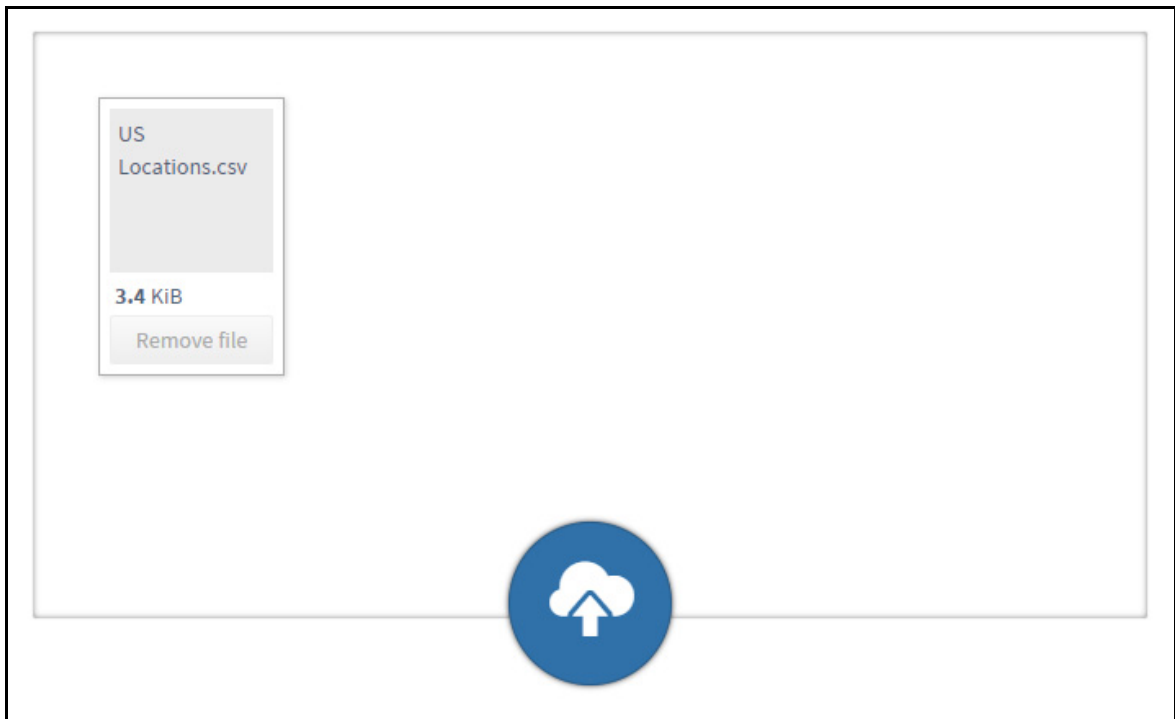
1. On the **Side Panel**, click **Import Data** and then **Locations** and then **Geocode Address**.



2. Drag and drop your location file into the upload box, or click the **Add** button to browse for your file.



Once a file has been placed in the box, the **Add** button will change to the **Upload** button.



3. Click the **Upload** button.

2. Location Properties

The **File Preview** window displays to set the location properties. These are options for better labelling and categorizing your locations. Your file may not have all of the same fields listed here. Select the options that best represent your file's content.

The screenshot shows a 'Properties' configuration window. It is organized into two columns. The left column contains four dropdown menus labeled 'Name Field', 'Map Label Field', 'Map Group Field', and 'Location Id Field'. The right column contains four dropdown menus labeled 'Description Field', 'Tags Field', 'Open Date Field', and 'Close Date Field'. Each dropdown menu currently displays 'Not selected' and a downward arrow. Below these columns is a section titled 'Available in all Workspaces' with a toggle switch that is currently in the 'OFF' position.

1. In the **Name Field** list, click the field that contains the name of the location. This will be used as the description of the location and used in dashboards.
2. In the **Map Label Field** list, click the field that contains the information that will be used for the label in mapping. This can be the same as the name field.
3. In the **Map Group Field** list, click the field that you will use to group or categorize your data. (Some examples include: locations and competitors; existing

and proposed locations; dealer locations and head office location; arenas and community centres and libraries.) Selecting a Map Group field for your locations will create a different map symbol for each category in the field.

4. In the **Location ID Field** list, click the field that you will use to link your locations to a customer file, if required.

Note: The Location ID field must be identical in both the location file and the customer file.

5. In the **Description Field** list, click the field that has a description of your location, if required. This can be used to further describe your locations.
6. In the **Tags Field** list, click the field that contains tags for your location, if required. This can be used if you have tags to describe your locations.
7. In the **Open Date Field** list, click the field that contains the opening date for your locations, if required.
8. In the **Close Date Field** list, click the field that contains the closing date for your locations, if required.
9. Turn the **Available in All Workspaces** switch on or off as required.
 - **OFF** means that this file is only available in the current workspace.
 - **ON** means that this file is available in every workspace.
10. Click **Next Step**.

3. Address Information

Since this process will use the address information, here you can specify the fields that contain that information.

The geocoding process will use the Street Address, City, State and ZIP/ZIP+4 fields. Please ensure that your location file has these four fields (the Country field is optional).

The **File Preview** window minimizes, but you can expand it if needed.

Address Information

Street Address Field Not selected ▼	City Field Not selected ▼
State Field Not selected ▼	ZIP / ZIP+4 Field Not selected ▼
Country Field Not selected ▼	

1. In the **Street Address Field** list, click the field that contains the street address for the locations.
2. In the **City Field** list, click the field that contains the city.
3. In the **State Field** list, click the field that contains the state.
4. In the **ZIP/ZIP+4 Field** list, click the field that contains the ZIP/ZIP+4.
5. Click **Next Step**.

4. Optional Additional Fields

In this step you can choose to import any additional fields that you may wish to use later in your analysis. If your file includes fields like store size, product/service offerings, store layout, or URL, you may wish to include them here.

Selecting the data type for these additional fields will display them as additional information in the attributes window on a map. For example, if you have a web site for each location, this column would be set with a URL type. This enables ENVISION to treat it as a link that can be clicked in the attribute window.

1. Set any field(s) for import by turning the switch **ON** for that field.
2. In the list, click the data type for that field.

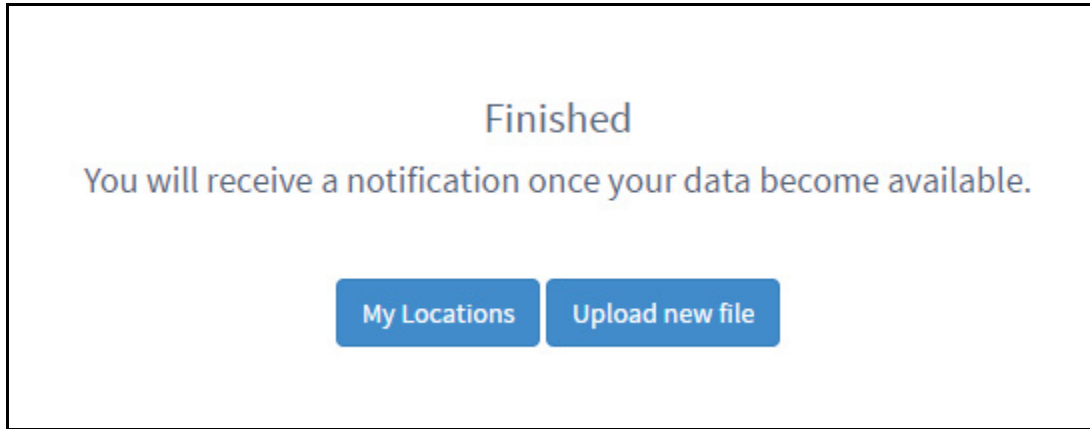
Tip: There is no need to select any of the fields you selected in the previous steps, including the address fields. These will already be included.

The screenshot shows a user interface titled "Import Additional Fields". At the top right, there are two buttons: "All" and "OFF". Below this, there are two columns of fields. The left column contains "LocationID" with a blue "ON" toggle and a "Text" dropdown menu, "City" with an "OFF" toggle, and "ZIP" with an "OFF" toggle. The right column contains "Address" with an "OFF" toggle, "State" with an "OFF" toggle, "CompanyName" with a blue "ON" toggle, and "Category" with a dropdown menu.

3. Click **Next Step**.

5. Finished

A message displays indicating that you are finished and that you will receive a notification when the file becomes available for use.



A notification displays in the bottom-left corner of your screen indicating that your locations have been submitted for importing. Another one displays indicating that the importing is complete.

1. You can also see the importing result in your **Results** list in the side panel.



Your location file will appear in the list.

Tip: In the side panel, you can also click **My Data** and then **Locations**.

