

# Using the Tree in Market Insight for Aggregation



**Decide with Confidence**

**Step 1:** Make your selection. For this example we used:

- Prospect in the Site Status
- We selected Puerto Rico
- Results were 49,030 records

The screenshot shows the 'New Selection 1' dialog box in the Market Insight software. The 'Selection' tree on the left shows a hierarchy: 'New Selection 1' contains 'Site Status AND Sample Customer Data having THE Site with St', which contains 'Site Status of Prospect', which contains 'AND THE Sample Customer Data having THE Site with State - Pro', which contains 'State - Province of PUERTO RICO'. The 'State - Province' panel on the right shows a search for 'pue' and a table of results. The table has columns for 'Include', 'Co...', 'Description', and 'Sites'. The first row is 'MX...' 'PUEBLA' with 9,833 sites. The second row is 'US...' 'PUERTO RICO' with 49,030 sites, and the 'Include' checkbox is checked. The 'Include' dropdown is set to 'Include' and the 'OR' dropdown is set to 'OR'. The 'Cover' tab is selected, and the 'Selection' tab shows '49,030 Sample Customer Data'.

**New Selection 1**

New Selection 1 Sample Customer Data

Selection

- New Selection 1
  - Site Status AND Sample Customer Data having THE Site with St
    - Site Status of Prospect
      - AND THE Sample Customer Data having THE Site with State - Pro
        - State - Province of PUERTO RICO

**State - Province**

Search: Description Co pue

State - Prov

Include	Co...	Description	Sites
<input type="checkbox"/>	MX...	PUEBLA	9,833
<input checked="" type="checkbox"/>	US...	PUERTO RICO	49,030

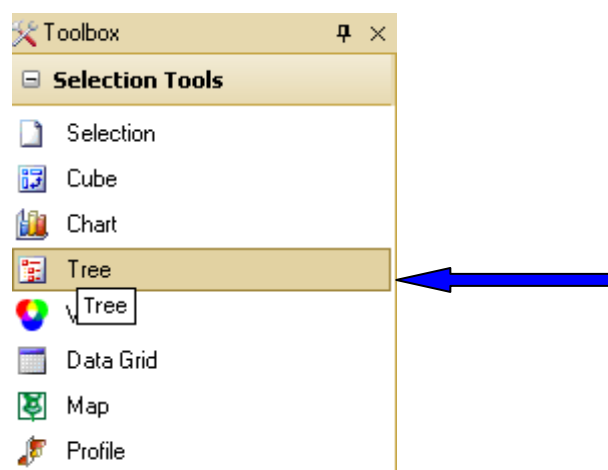
Include OR

Cover Selection

49,030 Sample Customer Data

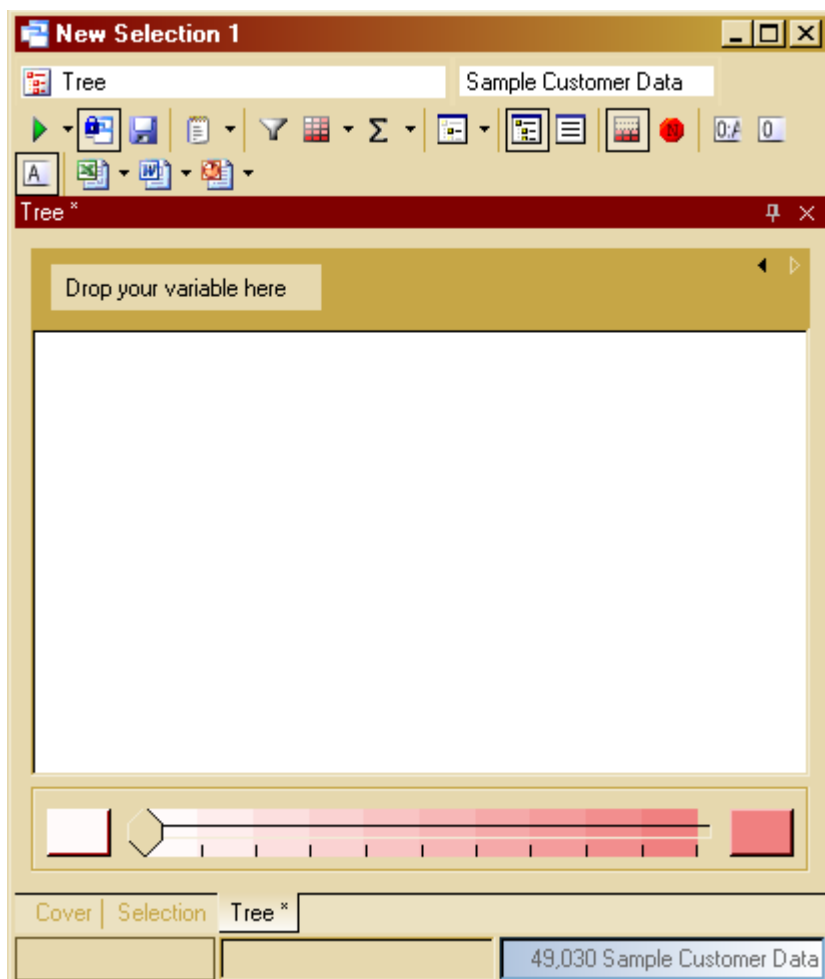


**Step 2:** Go to your Toolbox on the right hand side of Market Insight and drag a tree onto your selection.



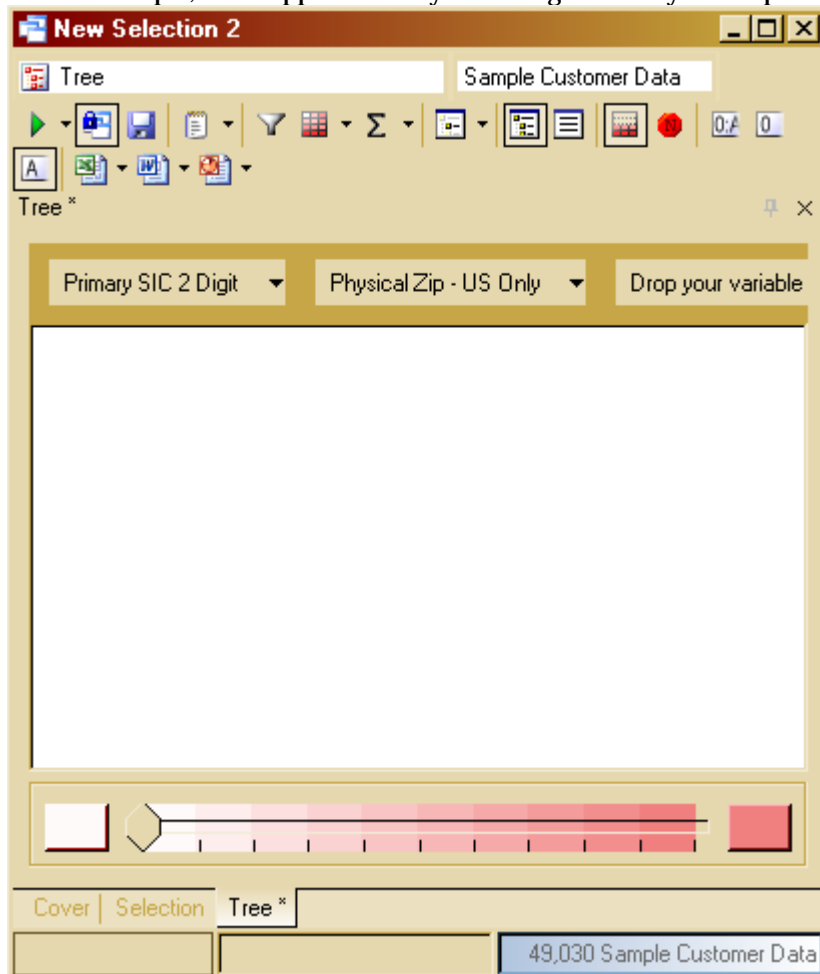


**Step 3:** Select the data elements and you will drag and drop them into Drop your variable here.





In this example, we dropped Primary SIC 2 Digit and Physical Zip – US Only into Drop your variable here.





You can select additional data elements using the statistic icon ( $\Sigma$ ). Once you have clicked on  $\Sigma$ , you can use data elements that have a <sup>1</sup>23 or  $\$$  or  $\text{table icon}$ . To add data elements such as employee total to the statistics, click on  $\Sigma$  pull down window. This will be the next screen that you will see:

Name	Display	Format	Use With Thematic
Sample Customer ...	<input checked="" type="checkbox"/>	General	<input checked="" type="checkbox"/>

[help...](#) [Add Statistics...](#)

OK Cancel Apply

Next click on [Add Statistics...](#). You will now see the following screen:

Statistics

— Statistics —

☒ **Use Resolve Table (Sample Customer Data)**

☐ **Specify other Table, Variable or Expression**

Drop your variable, table or expression here

Sum

Value

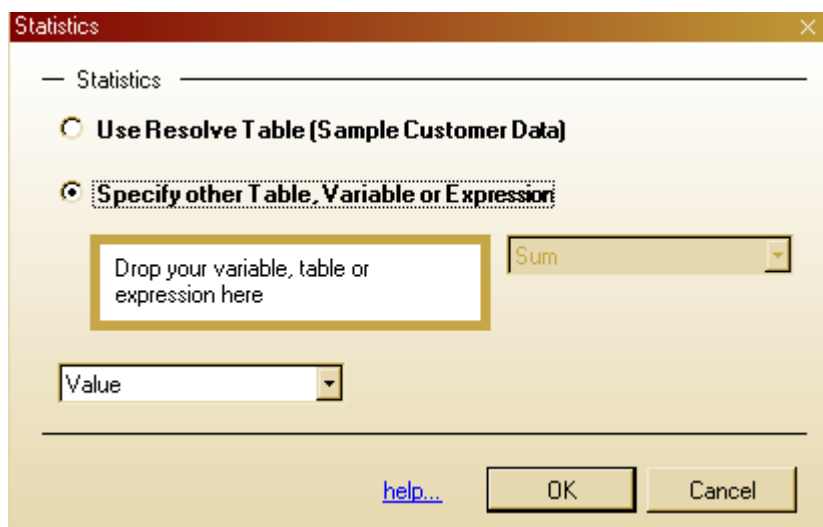
[help...](#) OK Cancel

Click on the circle for **Specify other Table, Variable or Expression**.


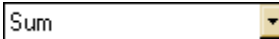



At this screen you will select your variable that has one of the following  or  or  and drop it in

Drop your variable, table or  
expression here



The 'Statistics' dialog box has a title bar with a close button. It contains a section titled 'Statistics' with two radio buttons. The first is 'Use Resolve Table (Sample Customer Data)' and the second is 'Specify other Table, Variable or Expression', which is selected. Below the second radio button is a text box with the placeholder 'Drop your variable, table or expression here' and a dropdown menu showing 'Sum'. Below this is another dropdown menu showing 'Value'. At the bottom are 'help...', 'OK', and 'Cancel' buttons.

In this example, I dropped in  Emp Total. For this example we will leave  and  as is.



Statistics

— Statistics —

☐ Use Resolve Table (Sample Customer Data)

☒ Specify other Table, Variable or Expression

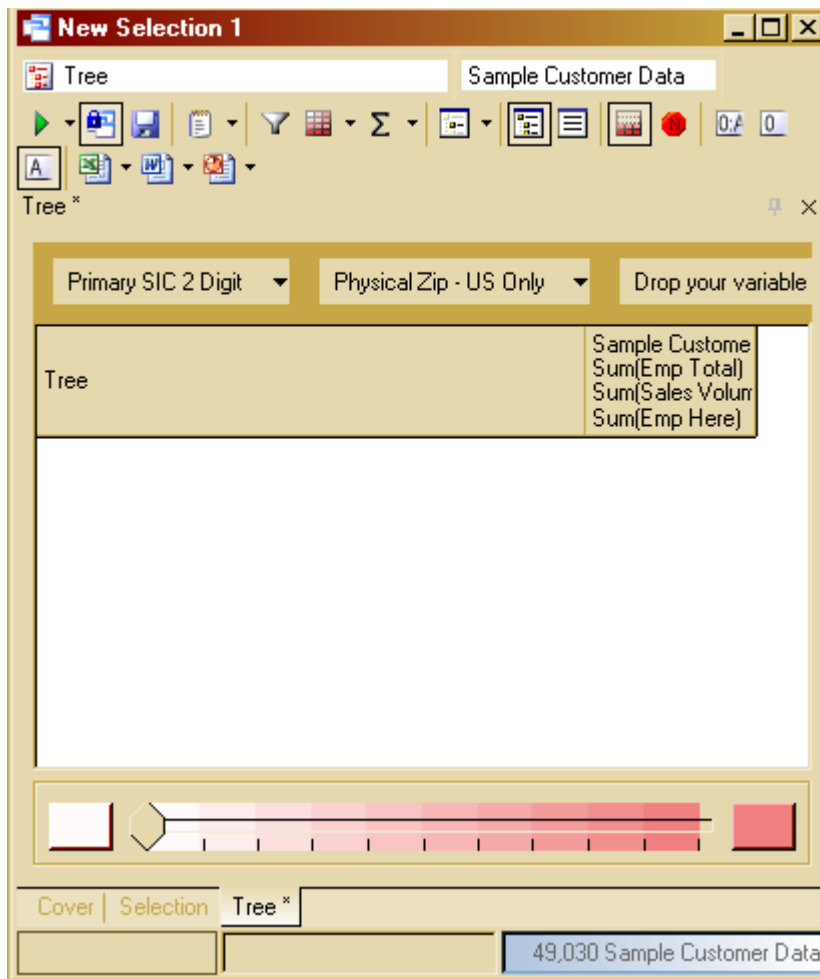
Emp Total Sum

Value

[help...](#) OK Cancel



For this example I also used <sup>1</sup><sub>2</sub><sup>3</sup> Sales Volume US and <sup>1</sup><sub>2</sub><sup>3</sup> Emp Here, following the same process that was used above.



To run your tree, click on .





**Step 4:** *Only if* you have too many cells, you will see the following screen:

Tree Size

There are too many cells to calculate the requested tree. Do you want to display only a portion of the tree or cancel the request?

☐ Show Full Tree

☒ Show Partial Tree

Minimum values for each statistic

Name		Minimum
Sample Customer Data	<input type="checkbox"/>	
Sum(Emp Total)	<input type="checkbox"/>	
Sum(Sales Volume US)	<input type="checkbox"/>	

☒ Restrict To Top N Values 1000

values on statistic Sample Custom

OK Cancel

You will want to uncheck

☒ Restrict To Top N Values 1000



Your screen will appear as follows:

**Tree Size**

There are too many cells to calculate the requested tree. Do you want to display only a portion of the tree or cancel the request?

☐ Show Full Tree  
☒ Show Partial Tree

Minimum values for each statistic

Name		Minimum
Sample Customer Data	<input type="checkbox"/>	
Sum(Emp Total)	<input type="checkbox"/>	
Sum(Sales Volume US)	<input type="checkbox"/>	

☐ Restrict To Top N Values 1000  
 values on statistic Sample Custom

OK Cancel

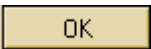
You will now want to check off the ☐.

Name		Minimum
Sample Customer Data	<input type="checkbox"/>	
Sum(Emp Total)	<input type="checkbox"/>	
Sum(Sales Volume US)	<input type="checkbox"/>	

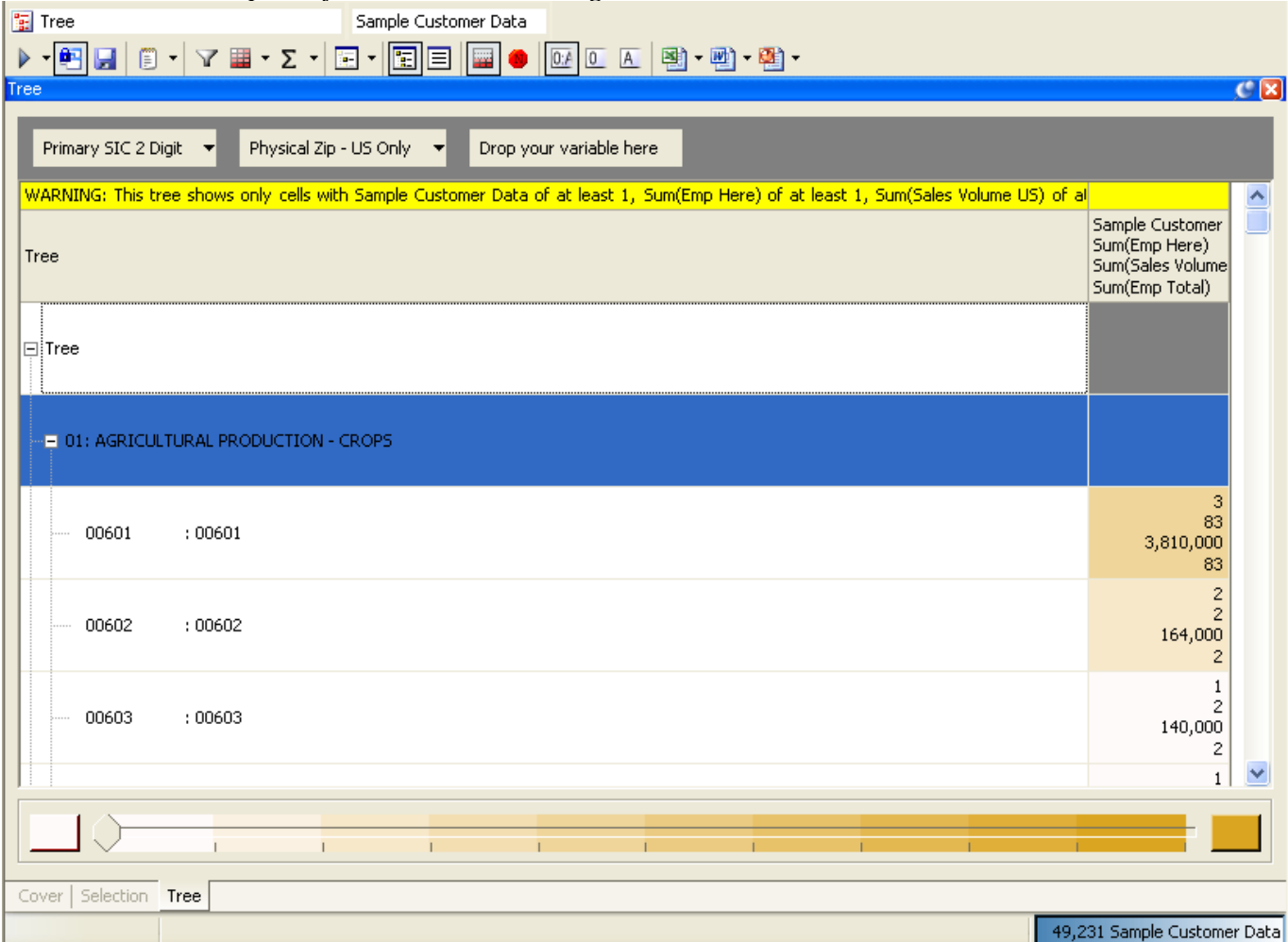
Once you click the ☐. You will see the minimum automatically change to 1.

Name		Minimum
Sample Customer Data	<input checked="" type="checkbox"/>	1
Sum(Emp Total)	<input checked="" type="checkbox"/>	1
Sum(Sales Volume US)	<input checked="" type="checkbox"/>	1



Now click on . And your tree will begin to run.

Once the tree has completed you will see the following:



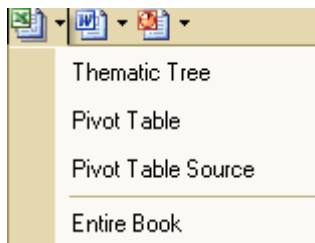
The screenshot shows the 'Tree' window in the 'Sample Customer Data' application. The interface includes a toolbar with various icons for file operations and analysis. Below the toolbar, there are dropdown menus for 'Primary SIC 2 Digit' and 'Physical Zip - US Only', followed by a text box 'Drop your variable here'. A warning message is displayed: 'WARNING: This tree shows only cells with Sample Customer Data of at least 1, Sum(Emp Here) of at least 1, Sum(Sales Volume US) of at least 1'. The main area displays a tree structure with a root node 'Tree' and a child node '01: AGRICULTURAL PRODUCTION - CROPS'. Below this, there are three sub-nodes: '00601 : 00601', '00602 : 00602', and '00603 : 00603'. To the right of the tree, a table shows the following data:

Sample Customer	Sum(Emp Here)	Sum(Sales Volume US)	Sum(Emp Total)
3	83	3,810,000	83
2	2	164,000	2
1	2	140,000	2
1	1		1

At the bottom of the window, there are tabs for 'Cover', 'Selection', and 'Tree'. The 'Tree' tab is currently selected. In the bottom right corner, a status bar indicates '49,231 Sample Customer Data'.




**Step 5:** To create the aggregation report, click on , next to , you will see the following screen:





Click on **Pivot Table Source**, you will see your screen change colors and an excel icon will open at the bottom of your screen.

Below is a sample of the results you will see in excel:

	A	B	C	D	E	F
						
1						
2						
3						
4	User	hemperlyn				
5						
6	Title	Tree				
7						
8	Primary SIC 2 Digit	Physical Zip	Sample Customer Data	Sum(Emp	Sum(Sales Volume US)	Sum(Emp Here)
9	79:AMUSEMENT AND RECREATION SERVICES	00917	8	26	805000	26
10	81:LEGAL SERVICES	00917	66	450	25336000	450
11	58:EATING AND DRINKING PLACES	00987	9	365	1592000	294
12	65:REAL ESTATE	00957	6	39	1394000	39
13	64:INSURANCE AGENTS, BROKERS AND SERV	00960	1	4	280000	4
14	59:MISCELLANEOUS RETAIL	00983	34	343	28165458	254
15	83:SOCIAL SERVICES	00917	23	5121	121543000	5145
16	82:EDUCATIONAL SERVICES	00919	3	86	2404000	86
17	62:SECURITY & COMMODITY BROKERS, DEAL	00968	5	128	10540000	178
18	81:LEGAL SERVICES	00921	12	42	2175000	42
19	78:MOTION PICTURES	00923	2	12	620000	12
20	65:REAL ESTATE	00950	1	2	100000	2
21	58:EATING AND DRINKING PLACES	00986	1	5	110000	5



**Notes:**

- If are using SIC in your selection, and you would like to see both the SIC Number and the description, click  , which will  . Then you click on the pivot table source, your Aggregation report will show both the SIC Number and description.