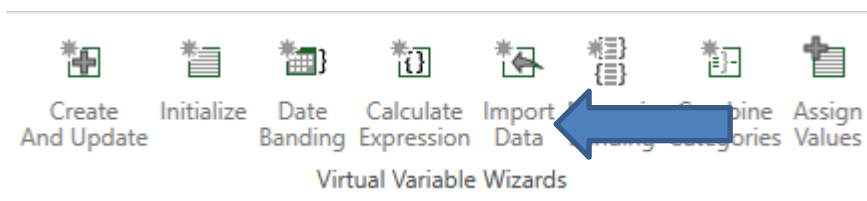


Market Insight How to Import Data (Virtual Variable)

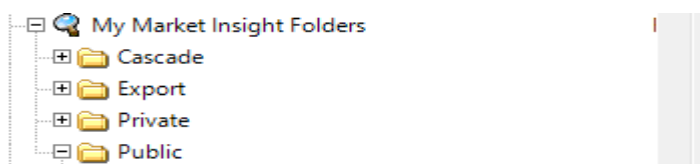
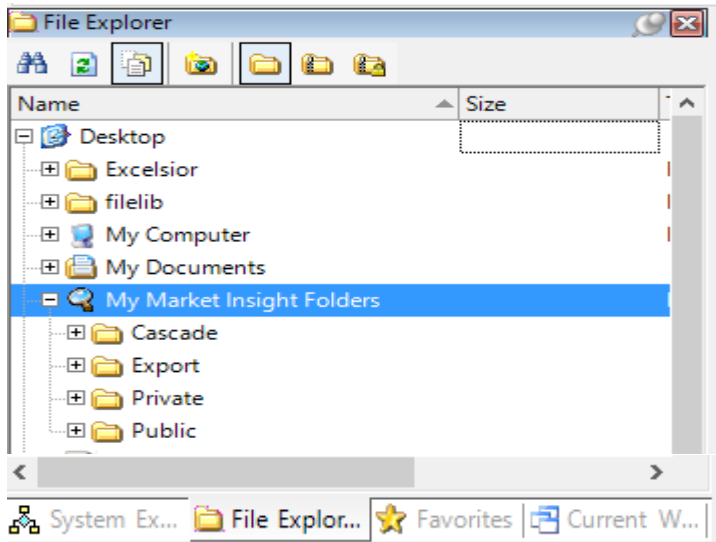
The “Import Data” feature within Market Insight will allow you to create a temporary Virtual Variable that you could use in your selection, analysis, or output. This variable will reside in your System Explorer window and operate just like any other variable on your system. This variable is temporary in nature meaning after 30 days the variable becomes “disabled” and will need to be refreshed in order to use this variable again. Please see **“How to Refresh Your Virtual Variables”** for additional guidance on how to restore them. The Virtual Variable cannot be transactional in nature meaning you will only see one occurrence of that variable. If you input data is at the transactional level a Virtual Variable cannot be used.

The Import Data icon can be found in the Virtual Variable Wizards Tab.



To import data, and therefore create a new variable, you first need to have the file created and saved as a .txt tab delimited file and stored on your hard drive. The file can contain as many columns as needed, but the first column should be the variable that already exists in Market Insight that you will be matching to. The first column is the “key” variable that will link the data your importing to Market Insight. Common “key” variables most customer use are DUNS number, zip codes, area codes, or state. You could import territory definitions using a zip code, or load revenue data using the DUNS Number. In this example, I will be using the DUNS number as the “key” variable which is the most common.

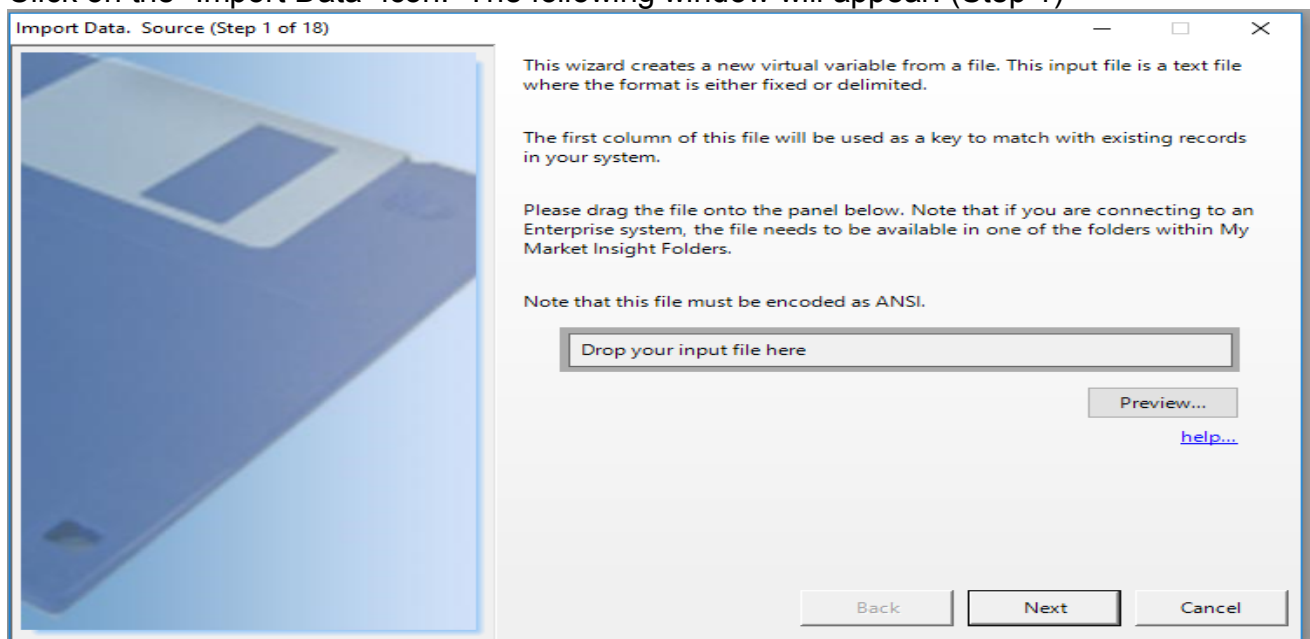
First step would be to drag-n-drop or copy & paste your input file (.txt) into the “My Market Insight Folders” which is found in the File Explorer tab. There is a Public and Private folder within “My Market Insight Folders” that you can copy your file to.



| | |
|-----------------------|-----------|
| Cust Duns.txt | 831.17 KB |
| Customer Analysis.xml | 86.36 KB |
| Customers.txt | 26.27 KB |
| Prospects.txt | 27.58 KB |

The file I copied into the Public folder was called Customers.txt. Once the file is successfully copied to either the Public or Private folder you can begin the Import Data process.

Click on the “Import Data” icon. The following window will appear. (Step 1)



You must drag-n-drop your input file onto the window that's says "Drop Your Input File Here".

Import Data. Source (Step 1 of 18)

This wizard creates a new virtual variable from a file. This input file is a text file where the format is either fixed or delimited.

The first column of this file will be used as a key to match with existing records in your system.

Please drag the file onto the panel below. Note that if you are connecting to an Enterprise system, the file needs to be available in one of the folders within My Market Insight Folders.

Note that this file must be encoded as ANSI.

Customers.txt

Preview...

[help...](#)

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Step 2 would be to define your data. Since the file is .txt tab delimited you would select the appropriate setting and click next.

Import Data. File Format (Step 2 of 18)

What format is this file?

☐ Fixed Format
This file is a fixed format text file

☒ Delimited
This file is a delimited text file. Please provide the delimiter below, and specify whether the first row contains headers.

Delimiter: Tab

Encloser: Nothing

☒ First row contains headers

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The next step is to identify the “Key” Variable in Column1. The tool will default to Column 1 which is highlighted in BLUE. There is nothing to do here just click next.

Import Data. Key Variable Location (Step 5 of 18)

Please indicate which column represents the KEY VARIABLE.

Column:

| Duns Number | Customer |
|-------------|----------|
| 198061848 | Customer |
| 878521277 | Customer |
| 622535417 | Customer |
| 010944650 | Customer |
| 962160722 | Customer |
| 611792912 | Customer |
| 008098212 | Customer |
| 079330215 | Customer |
| 160068433 | Customer |
| 196904069 | Customer |
| 825265726 | Customer |
| 001367549 | Customer |
| 001534833 | Customer |
| 013932165 | Customer |
| 127627441 | Customer |

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On this screen click on the next column that identifies the data we want to import. When you click on the column it will turn blue. The description in the column is what you will see in the selection window when you use this variable. Click Next.

Import Data. Data Item Location (Step 6 of 18)

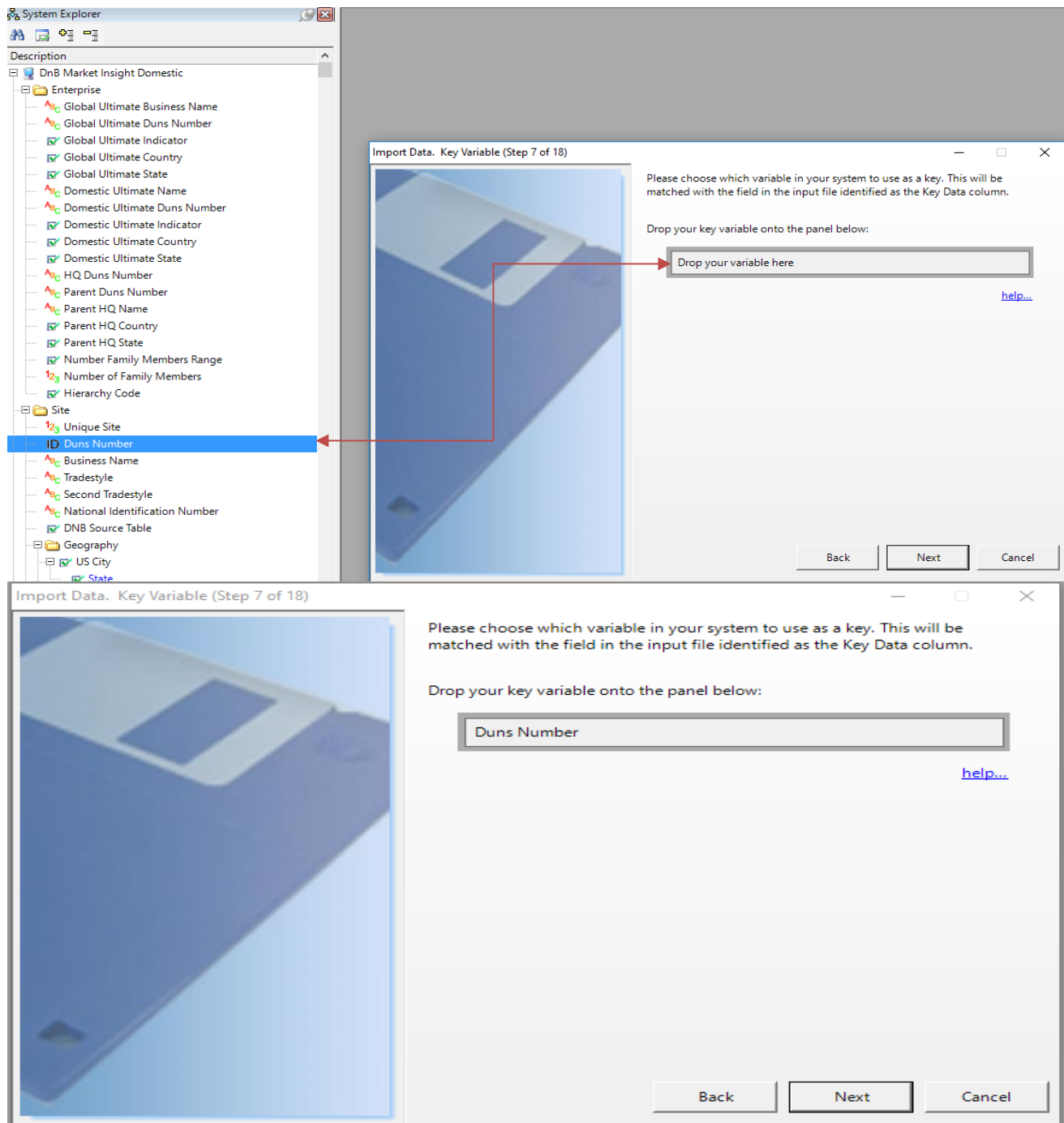
Please indicate which column represents the DATA.

Column:

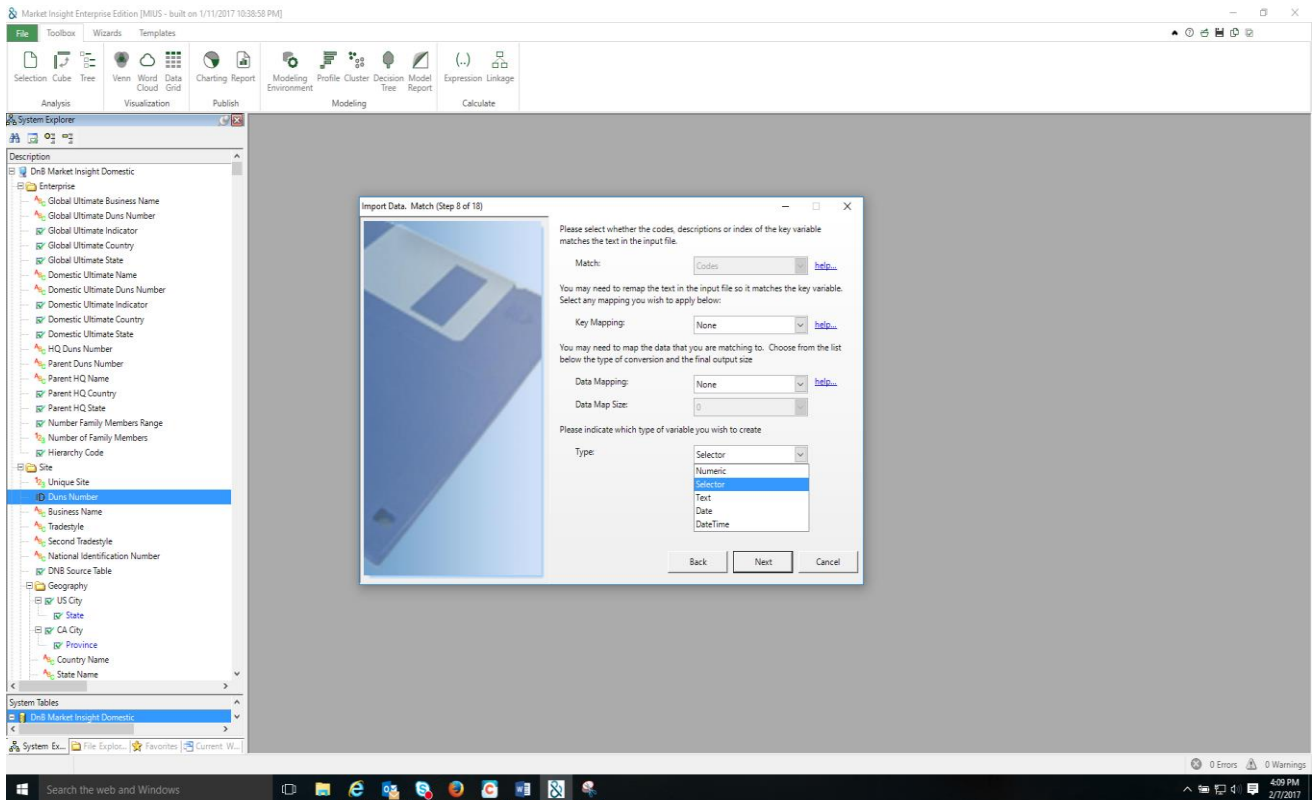
| Duns Number | Customer |
|-------------|----------|
| 198061848 | Customer |
| 878521277 | Customer |
| 622535417 | Customer |
| 010944650 | Customer |
| 962160722 | Customer |
| 611792912 | Customer |
| 008098212 | Customer |
| 079330215 | Customer |
| 160068433 | Customer |
| 196904069 | Customer |
| 825265726 | Customer |
| 001367549 | Customer |
| 001534833 | Customer |
| 013932165 | Customer |
| 127627441 | Customer |

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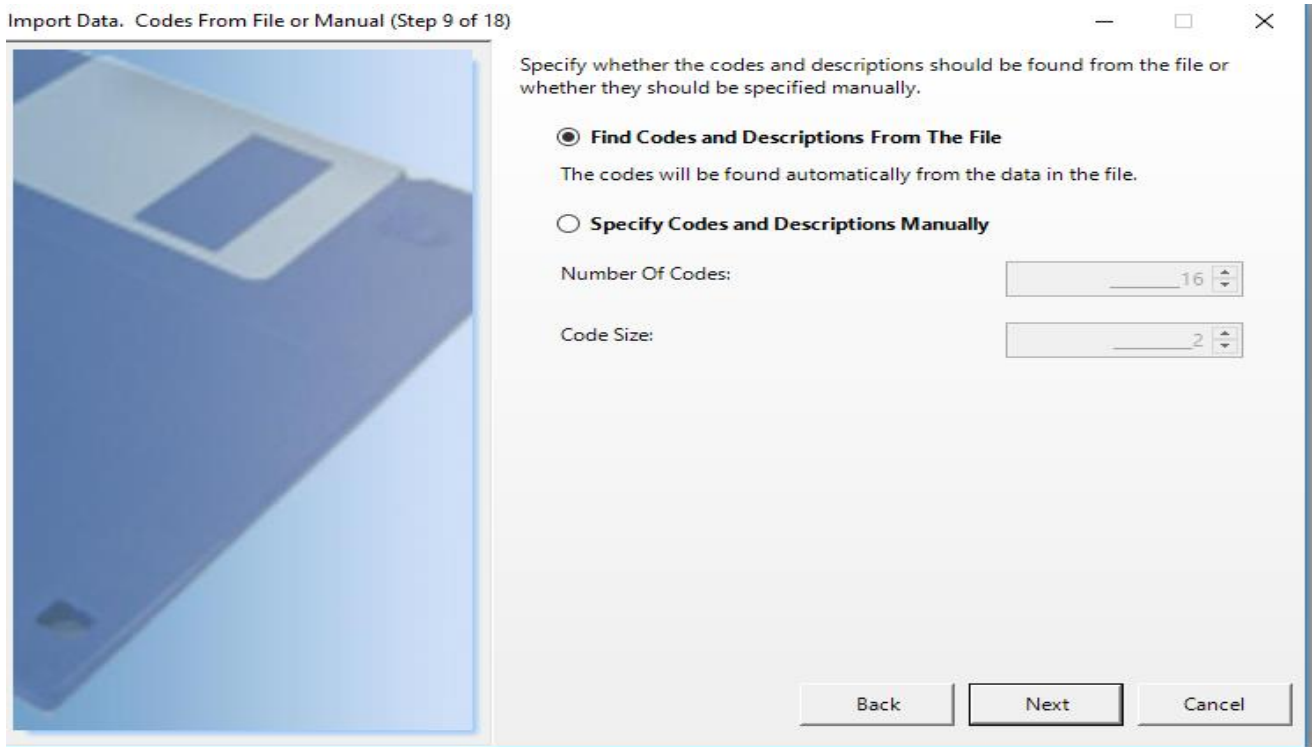
On the next screen you will need to drag the variable you are using to connect the data, in this case the DUNS Number, from the System Explorer tab and drop it onto the window that says “Drop Your Variable Here”.



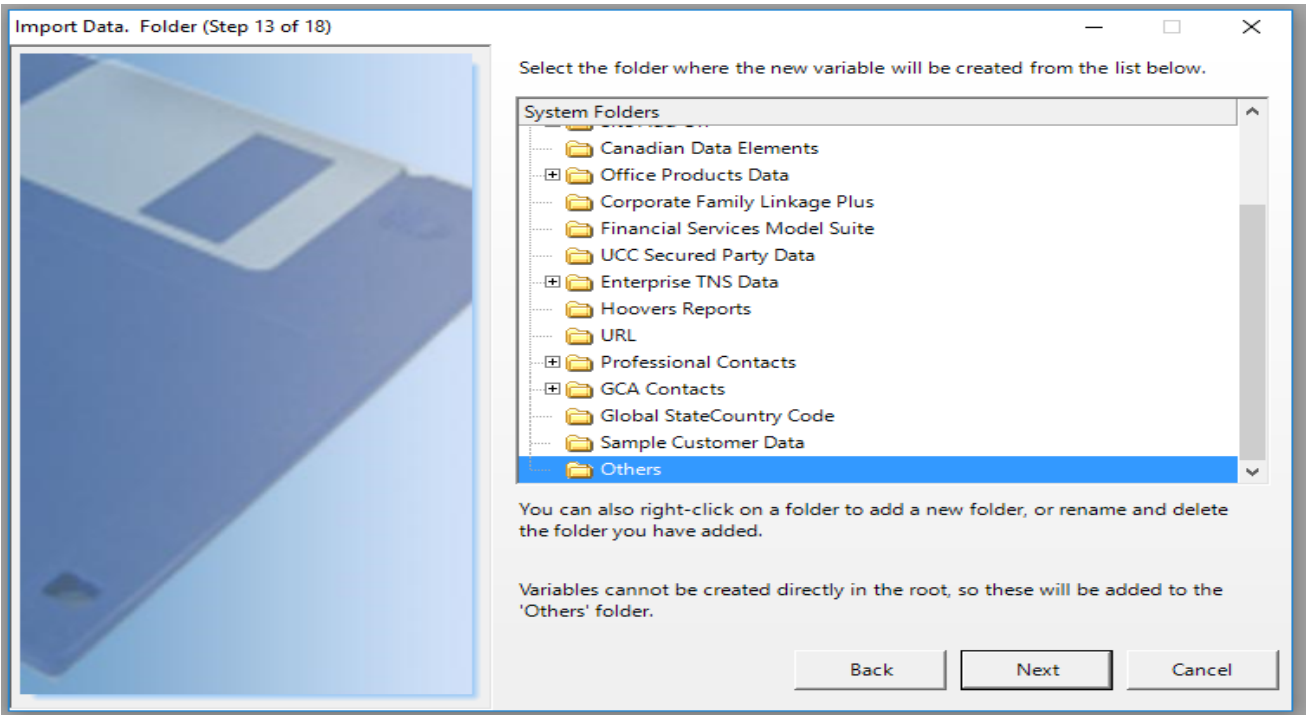
Step 8 of 19 you will need to define using the different drop down boxes the “Type” of field you want to create for the variable. In this example we want to create a “Selector” variable which creates a “Pick List or Code Table” of the variable. If the input data was numeric you would choose “numeric” here. If the data was a date or text field variable you would select one of those options. Most common type used for Virtual Variable is “selector.”



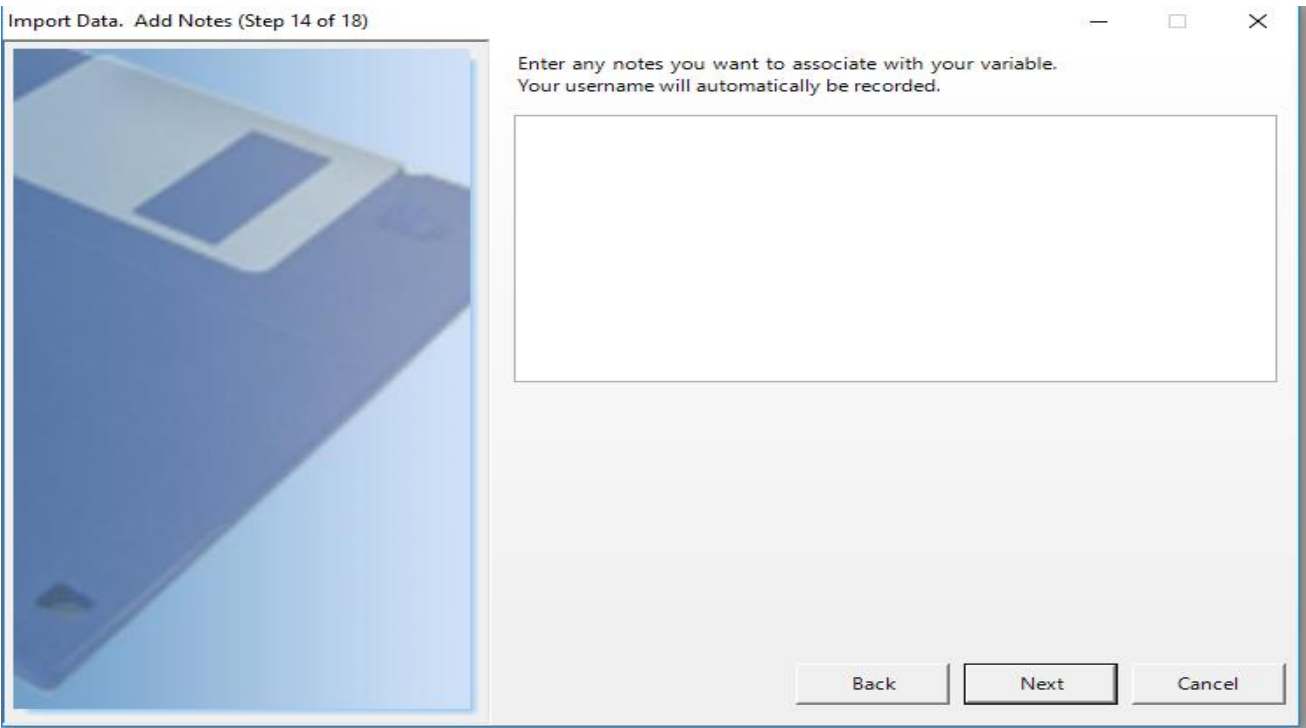
The next screen you do not need to do anything on this screen leave the default checked and click next.



Step 13 of 18 you will need to select which folder in the “System Explorer” tab you want to save your new Virtual Variable. The tool will default to the “Others” folder. This is where most customers will save their new variable. Once you select the folder click next.



On this screen you can add any notes regarding the new Virtual Variable that you like. Enter your notes in the white free form box. Click next.



Step 15 of 18 is where you will name your new variable. This new variable name will appear in the System Explorer tab in the folder you selected. In the Description field type in your new variable name. Click next.

Import Data. Name (Step 15 of 18)

We need a description for your new variable. A unique variable reference will be created for the variable based on the description and table name.

Description:

Alternatively you can choose to overwrite an existing virtual variable with these new values. Drag the variable to be overwritten onto the panel below.

If you wish to change the security attributes for this variable for yourself, your group or other users check the checkbox below

☐ Modify Security Attributes

0 %

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Last Step 18 of 18 you will get this message when Market Insight has successfully created you new Virtual Variable. The records updated represents the number of site records your new variable has been applied to. Click on the "Show new variable as a selection" box and then click finish.

Import Data. Finish (Step 18 of 18)

Wizard Action Complete

This wizard has completed performing the requested actions. The effected variable has been highlighted in the System Explorer.

Records Updated: **1,344**
Codes Updated: **2**

If you wish to start a new selection with this variable, check the box below.

☒ Show new variable as a selection

Click 'Finish' to exit this wizard.

Back Finish Cancel

A new selection will be opened with your new variable populated in the selection window. You can now use this variable for analysis or in a data grid.

