Importing territories to the map

To add territories to the map, you can import data from an external source such as **Microsoft Excel**. The following instructions will give you a step by step guide on how to import your data from Microsoft Excel into SKiN and display them as territories on a map.

Before you begin

Before you start using SKiN you need to ensure you have data setup and ready to use within SKiN. To get help on setting up your data please refer to the following:
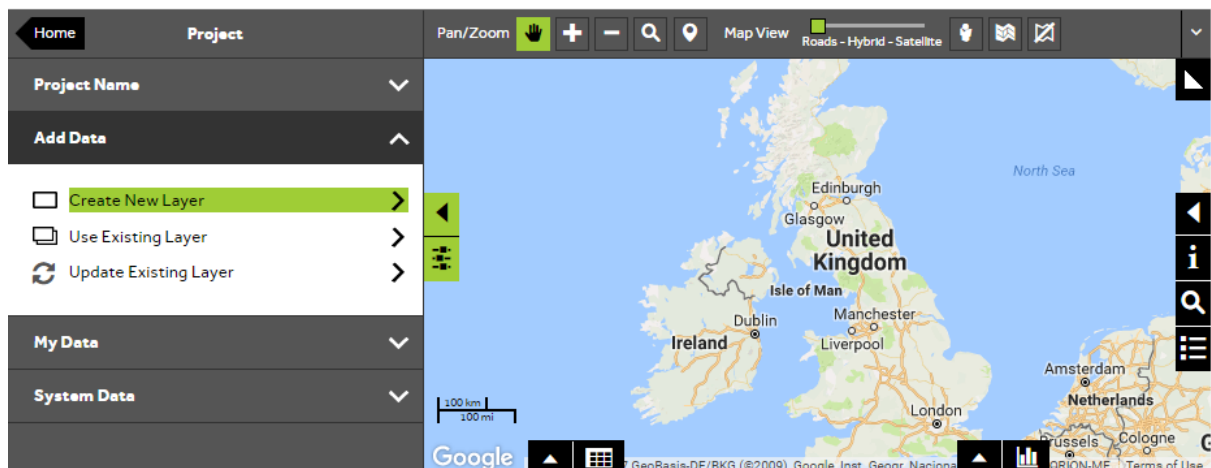
- Territories Steps - File

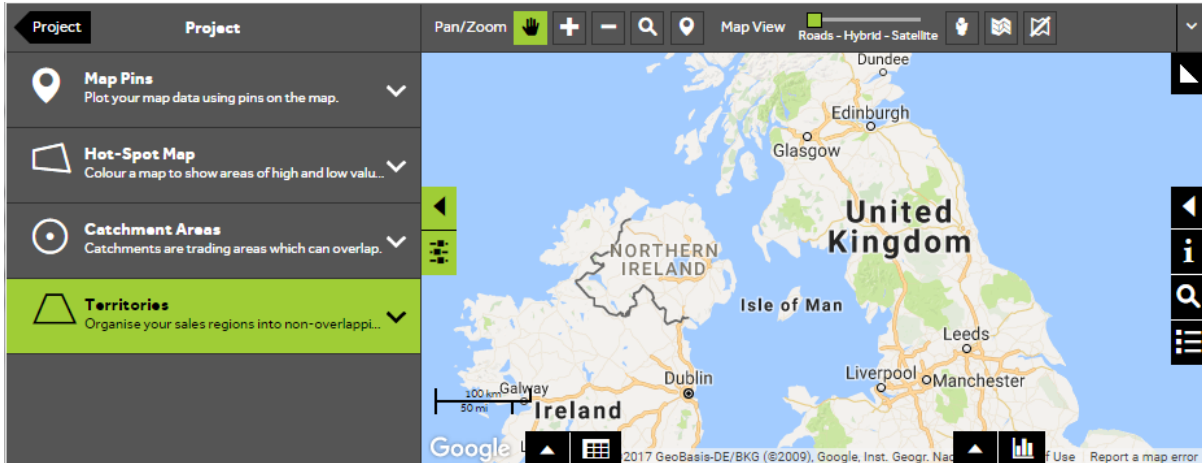Powerful, interactive mapping on a global scale.

1 of 6   **Create new layer**

- To add your own data, **Open or Create a new project** and then choose **Add Data, Create New Layer**.

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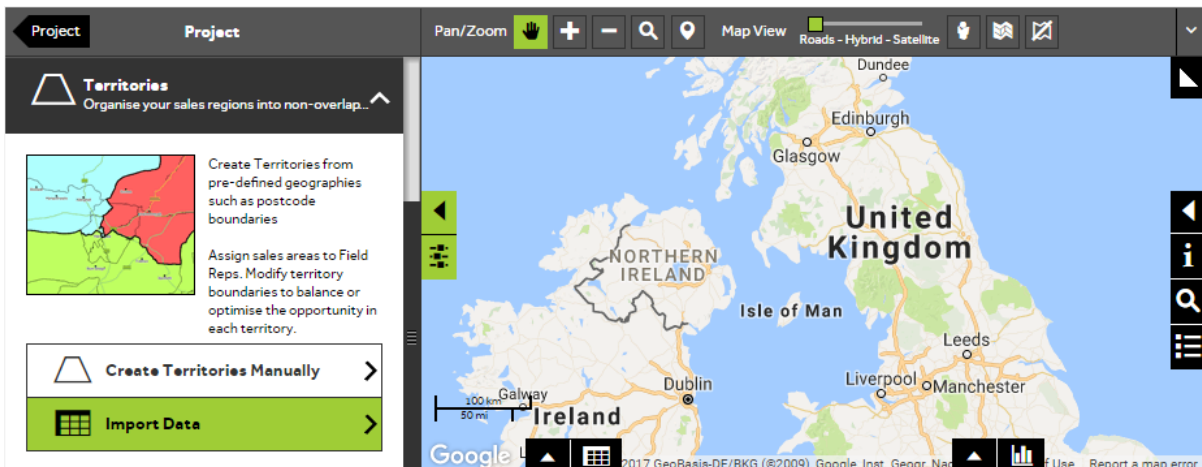**2** of 6 · **Choose which type of layer to create**

- Select **Territories** to use each of the rows in your data to build territories on the map.
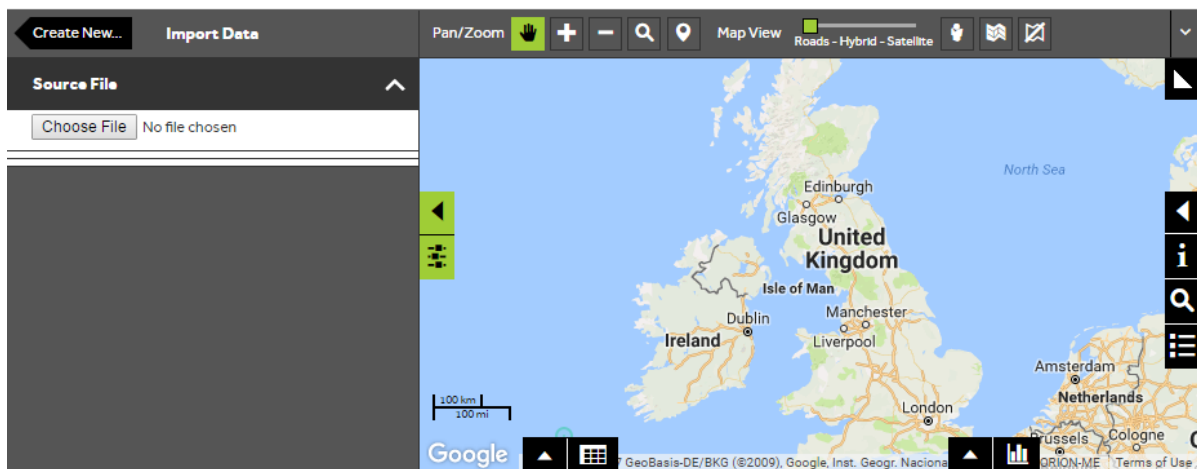

3 of 6 · **Import your Data**

- To add multiple territories to the map, you can import data from an external source such as Microsoft Excel. Select **Import Data** to add your data to the map.

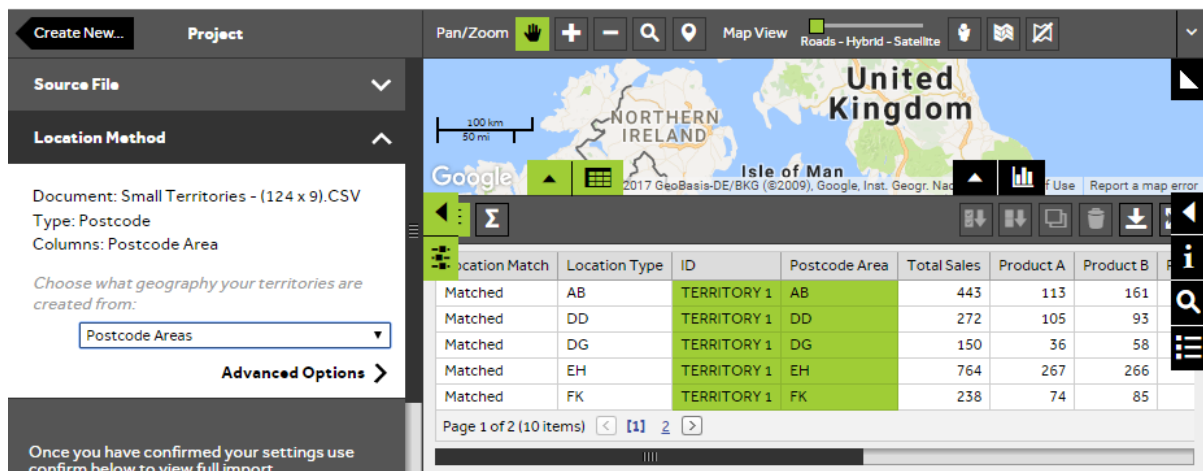**4** of 6   **Choose the file that you want to display**

- In order to map territories automatically, your data needs to contain a set of unique geographical areas, or 'building blocks' (e.g. Postcodes) and include a column indicating which territory each 'building-block' belongs to. Each 'building-block' will be colour-coded based on which territory it belongs to.

- Press **Choose file** and locate the file that contains the records that you would like to display as territories on the map.

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5 of 6   **Check that the Location Method is correct**

- The system will review the first 10 records in your file and select the first column in the data to use as the 'building-blocks' for the territories. It will also look for a column it can use to define the territories (e.g. Owner)
- If the system finds these columns, it will show you the first 10 locations on the map and highlight the columns it is using in the **Data View**.
- If the system cannot find a suitable column automatically, you will be re-directed to the **Advanced Options** for importing. In the **Import Advanced Options**, **Location Settings** section you can specify both the method used to map each building-block and the column that contains this information. In the **Import Advanced Options** section, you can also check that the correct **ID Column** has been selected correctly.
- Once you are happy with the settings click the Import Data back arrow at the top of the panel to return to the preview screen.
- Choose which geography (or boundary) you want to use to create your territories by selecting one from the dropdown list. This should match the data that you are importing.
- Once you are happy with your settings press **Confirm Selection** to import the whole file.

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6 of 6   Check how many of your records can be displayed

- The **Matched Records** figure here shows how many of your records could be located on the map.
- Any Records that could not be matched will have **'Unmatched'** in the **Location Match** column in the **Data View** below. You will need to update the column in the import file and start the import process again if you wish to include the unmatched records.
- Once you are happy with the **Matching Results**, press **Create Layer** and wait until the processing is complete. Your layer will then be created and ready for use.

If you don't see your territories on the map

If you don't see the see the territories on the map or you would like further assistance, please review the following information:

- Watch a video on: **Importing Territories to the Map from Excel**
- Refer to: **The data format and setup guide**
- Contact: **Geoplan Support**

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What do you want to do next?

Once you have imported your territories to the map you may want to add or remove components from your territories to try to balance them or you may wish to add a new territory. Please refer to the following sections of the support area for further assistance:

- Refer to: **Territories Steps – Add / Remove Components**
- Refer to: **Territories Steps – Switch on Balancing**
- Refer to: **Territories Steps – Create New Territory**
- Contact: **Geoplan Support**

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