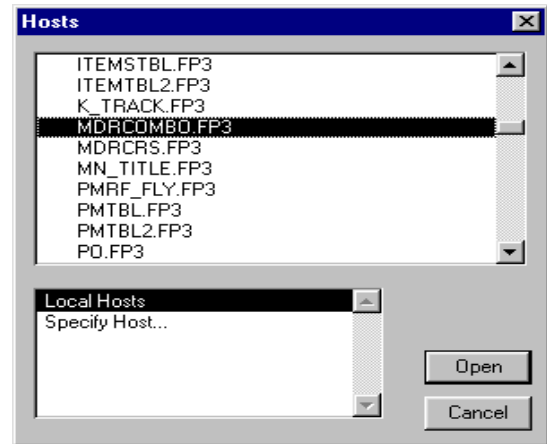
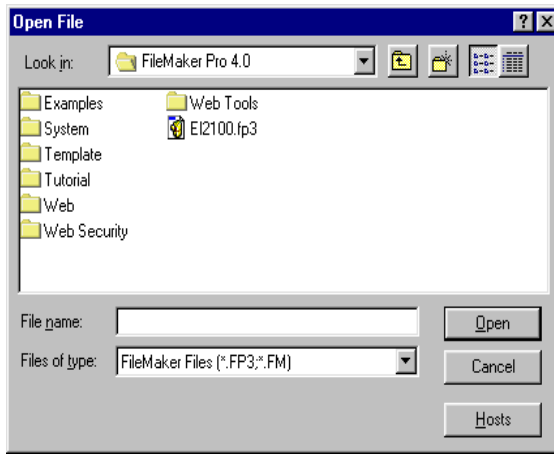


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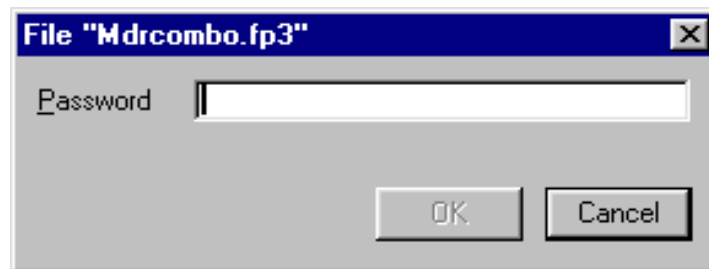
Data Retrieval and Analysis for Sample Information

This training session will cover making a sample pull from the Filemaker Pro MDR database and conversion into Excel. Also covered is the extended analysis process that occurs after the conversion. Part VII covers building packets for phone surveys.

1. Open Filemaker Pro
2. Click on “Existing File” icon
3. Click on “Hosts” and then scroll down to MDRCombo.fp3 and click to highlight.

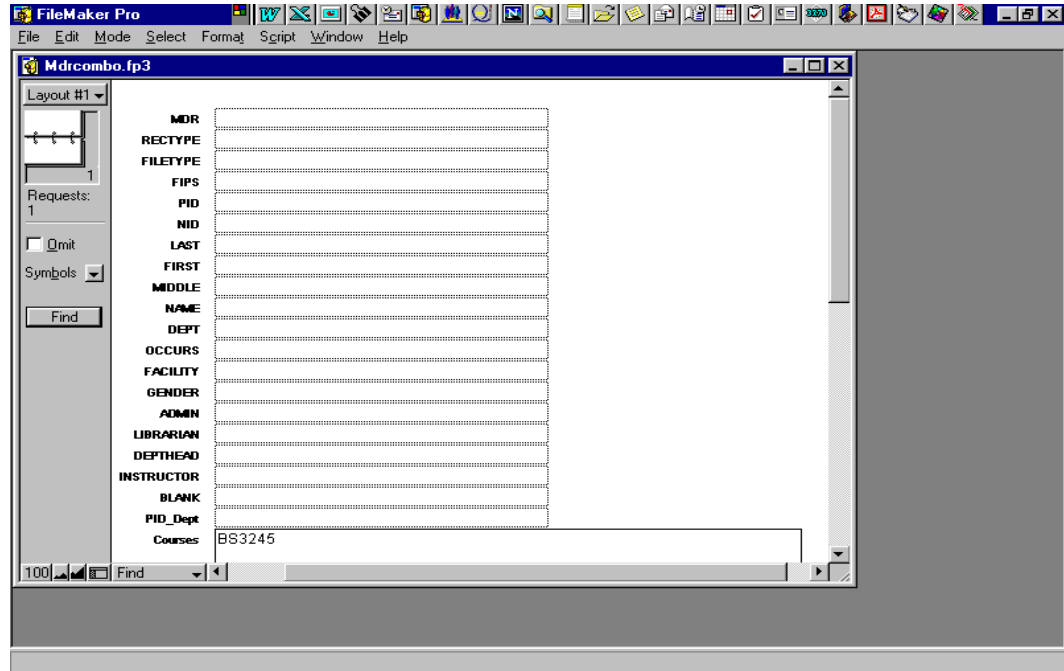


4. Click “open”
5. At password window, type in the current password which is “modatech” until further notice



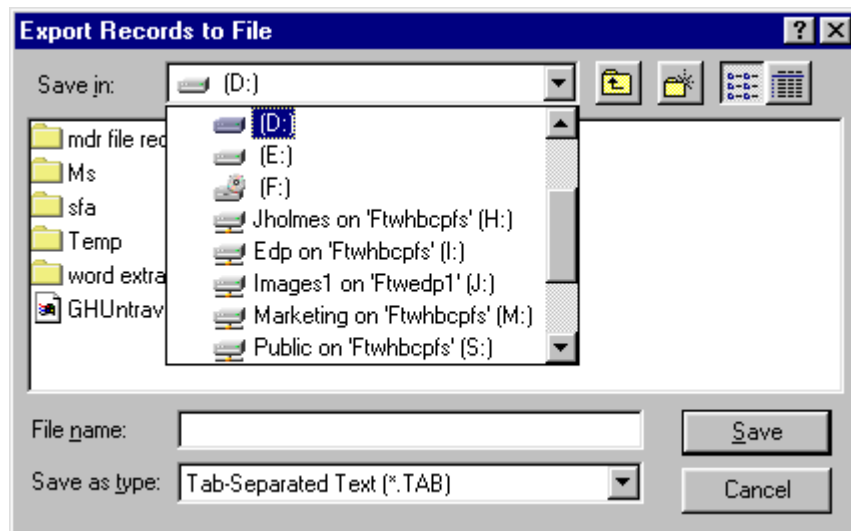
6. At the database window, click inside the “courses” field, then press on **CONTROL + F**.
7. Type in a course code (i.e. BS3245 in View A), then click on “find” or hit **ENTER**. (see appendix at end of this section for additional pull criterias)

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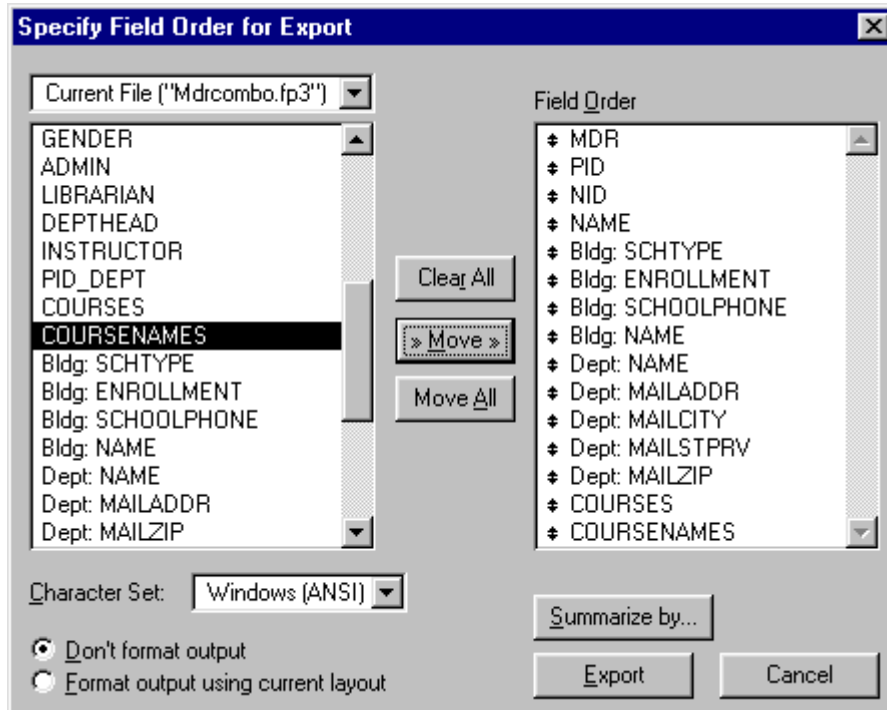
View A

8. When the search has ended and the request is now pulled, then prepare to export the file.
9. Go to **FILE**, then **IMPORT/EXPORT**, then **EXPORT**.
10. First change drive to where you wish to save the export file. For the name, type in the project #and extended name plus a .tab extension. (i.e. 229Fuller.tab). Hit “save”



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11. At export window, move the fields needed from the left window to right by selecting each one and hitting “move”



12. When moves are completed, hit **EXPORT** and minimize Filemaker Pro to go to the next job.

Notes on types of pulls from MDR:

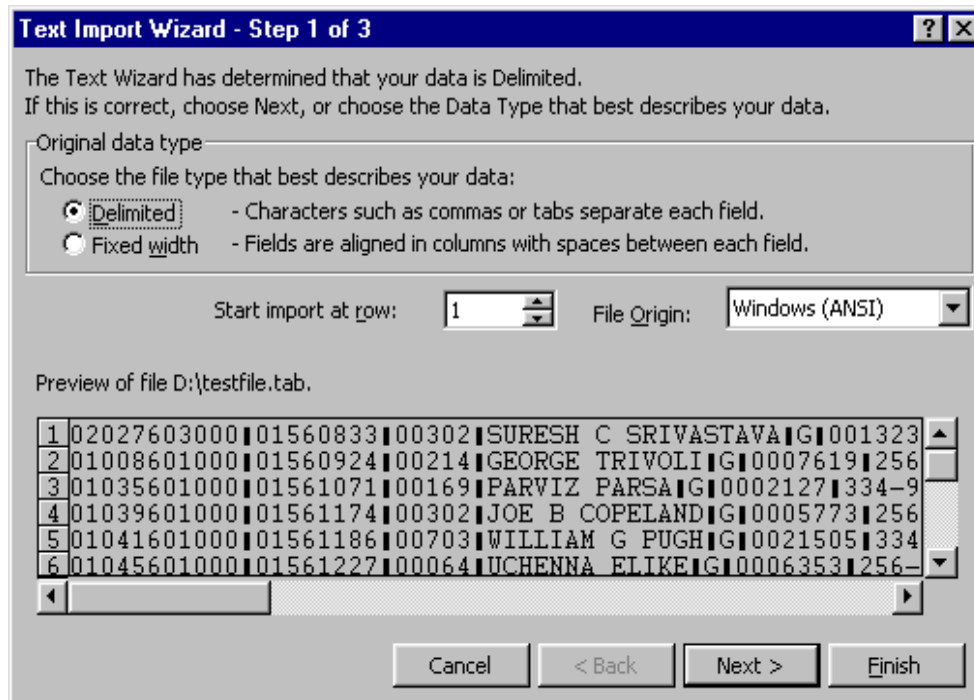
1. To pull multiple requests in course codes with deduping, type in your first course code, then go to the menu bar to MODE, and highlight NEW REQUEST. Type in your second course code and repeat the above until all course codes have been entered.
2. If you need certain criterias such as “greater than or equal to” in enrollments, click on the SYMBOLS dropdown box at left and pick out your needed symbol. HINT: There must always be 7 figures in this box but no commas. Type in preceding “0”s to equal the 7 spaces. IE ≥ 0010000 means you are asking for enrollments “equal to or greater than 10,000.
3. To ask for professors who teach **both of two or more** different courses, you would enter in the first course code, then a colon, then the next course code, another colon, and so forth until all the course codes had been entered on that same line. Then click FIND.

***** (End Part I) *****

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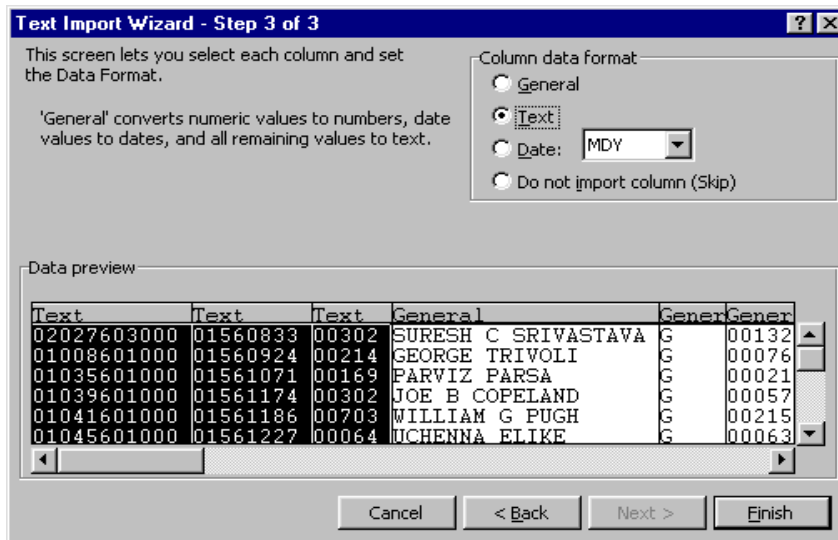
PART II
Transferring/Converting to Excel

1. Open the Excel program first and go to “File” and to “Open”
2. Change the directory to where the tab file was saved; change the “files of type” at bottom of Open Window to say “all files” instead of “Excel files”. Find tab file and highlight to open. The Excel Wizard will open up.

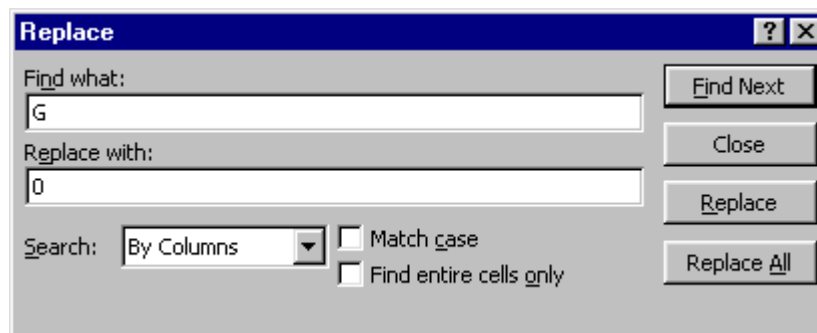


- a. Click on “delimited” and click “next” (Sometimes this is already clicked)
- b. Click on “comma” and click “next”
- c. Determine the columns with numbers that possibly begin with a zero (0) i.e. a zipcode; highlight column and click on “text” You can also select adjacent columns by holding down the **SHIFT** button (CONTROL button does not work here). Clicking as a text column allows the beginning zeros to remain visible after the conversion.
- d. Click on “finish” to complete the wizard conversion. At this point, if you have Sherlock’s MDR headers macro, then run this to get your column headers in the file. Then save this as an Excel file.

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3. For the MDR sample file, if there are graduate schools listed in the **TYPE** column, then **highlight** the whole column by clicking on the header.
 - a. Do a search for all “G”s, change to “columns” search, and change to “values” search
 - b. Do a replace with “4”, and then click “ok”
 - c. Only the Gs in this **highlighted** column will change to a “4” as opposed to all Gs (a real problem!!) in the spreadsheet when the column is NOT highlighted.



***** (End Part II) *****

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Part III

Regional Macro Section

1. Insert new blank column after the “state” column on the right-hand side. Type in REGIONS in the header cell.
2. Make a note of the name of the file on a spare piece of paper. This is important later on.
3. Go to your Regions & Random folder (copy this from server) and open the following:
 - a. Regions.xlm
 - b. Mawlкуп.xls
 - c. Random.xls
4. Now go up to the WINDOW command, drop down and click on the file you are currently working with.

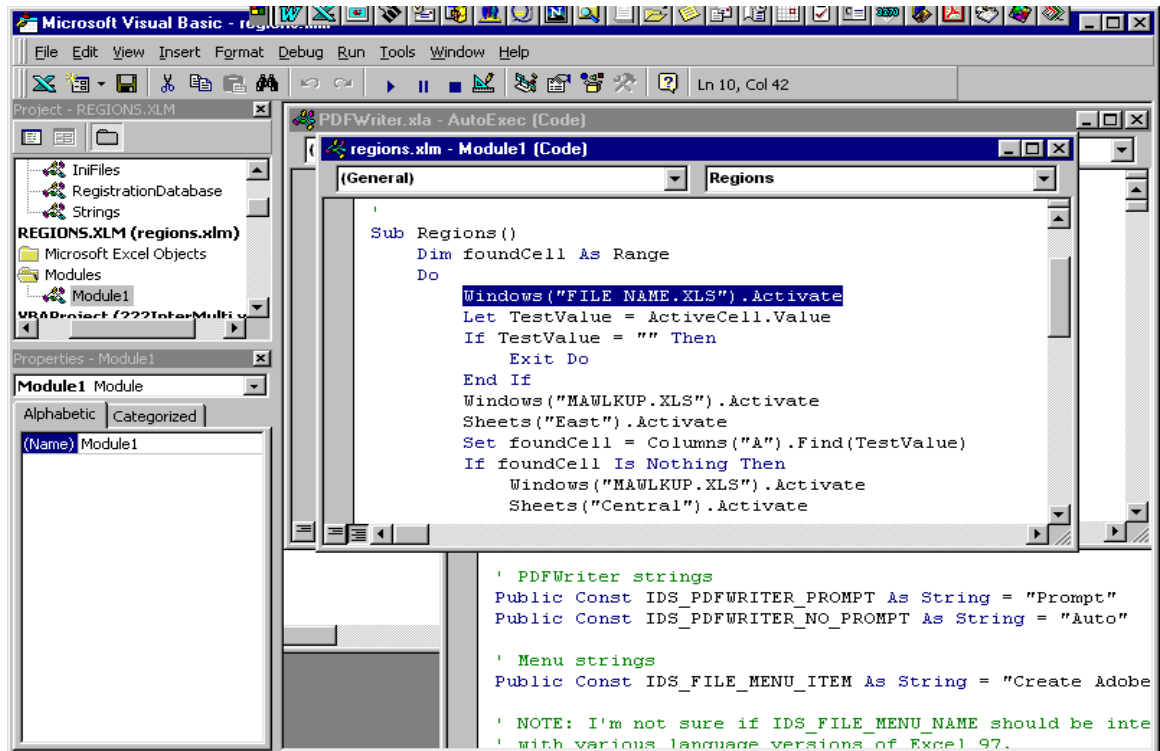
	K	L	M	N	O	P
1	ADDRESS	CITY	STATE	REGIONS	ZIP	ZIP+X
2	1300 N PLUM STREET	HUTCHINSON	KS		67501 5831	BS0010:BS5010:...
3	900 ARKADELPHIA ROAD	BIRMINGHAM	AL		99775 0127	BSZZZZ:BS0010:BS...
4	100 CARR RD	CAMDEN	AR		99775 6080	BS0010:BS4100:BS...
5	4190 W STATE HIGHWAY 80	DOUGLAS	AZ		99775 0127	BS0010:MA0310:11...
6	1971 JAGERSON AVENUE	KINGMAN	AZ		99775 6080	BS0010:.....
7	25555 HESPERIAN BLVD	HAYWARD	CA		99901 5728	BS0010:BS1130:BS...
8	300 W CHERRY LN	COALINGA	CA		99835 9418	BS0010:BS1130:BS...
9	3000 COLLEGE HEIGHTS BLV	RIDGECREST	CA		99508 8211	AG0035:BSZZZZ:BS...
10	1000 W FOOTHILL BLVD	GLENDORA	CA		99508 8211	BS0010:BS4250:BS...
11	1111 FIGUEROA PLACE	WILMINGTON	CA		36420 1418	BS0010:BS4205:BS...
12	5800 FULTON AVE	VAN NUYS	CA		35077 2000	BS0010:BS4205:BS...
13	3600 WORKMAN MILL RD	WHITTIER	CA		36702 9985	BS0010:BS1100:BS...
14	30800 PALOS VERDES DR E	RANCHO PALOS	CA		36703 3323	BS0010:BS4100:BS...
15	9200 VALLEY VIEW STREET	CYPRESS	CA		35254 0002	BS0010:BS1100:...
16	11460 WARNER AVENUE	FOUNTAIN VLY	CA		35254 0002	BS0010:BS4205:BS...
17	3835 FREEPORT BLVD	SACRAMENTO	CA		35254 0002	BS0010:BS5010:BS...
18	701 S MT VERNON AVE	SN BERNRDNO	CA		35254 0002	BS0010:BS4210:...
19	8800 GROSSMONT COLLEGE D	EL CAJON	CA		35254 0002	BS0010:BS1140:BS...
20	900 OTAY LAKES RD	CHULA VISTA	CA		35254 0002	BS0010:BS3110:BS...
21	4200 FARM HILL BLVD	REDWOOD CITY	CA		35254 0002	BS0010:BS4205:...
22	12345 EL MONTE RD	LOS ALTOS	CA		35254 0002	BS0010:SS2410:...

5. Click on the first cell with a state abbreviation in your state column. (As above)

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6. Go to TOOLS, find the regions macro in the list, click on it and run it. The ERROR window opens up.....not a problem!!!! Do the following.
7. Hit the DEBUG button in the error message. The macro VBA dialogue window opens up for editing.
8. Where the line has "FileName.xls" (at the beginning and at the end of the script), change FileName to **your** current file name. This must be typed exactly although **Case** does not matter.



9. When done, move to the menu bar above, hit on RUN, then CONTINUE. If all is well in macro land, you will see the cursor hourglass come up. When that disappears, then the macro has either finished or there was an error in the states column. The error will automatically cause the macro to stop. Clean up the problem then restart the macro by placing the cursor in the state column where the macro stopped. Go to DATA, then MACRO, until you get to your list and select the regions macro, and RUN it. The macro continues from that point until the end of the data in the column.
10. When the macro ends, recheck Region column for "invalid entries" which actually will show up later in your pivot tables as a blank area. Also be aware that if you have subtotaled your data at the bottom of your original spreadsheet during a previous job, you will need to remove that totaled line as the pivot table will read and sum that information into its calculations.

***** (End Part III) *****

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Part IV
Randomization Notes/Phone Packets Section

1. Insert a new column in front of the A column, then go to the random.xls file.
2. Copy the column with 1 – 20 and paste it into the new empty column on your working spreadsheet. It should say **DEL** or **Delete** in the header row but if not, type it in.
3. Go to the bottom of the spreadsheet and cut out any extra overlap in the 1 – 20 column as it will not sort properly if you don't. The 1 – 20 column has 5,000 entries (if you're using the one I made.)
4. Sort by the Delete column in the ascending pattern. Now do the random pivot table if you are using **packs** for your vendor in a **phone survey**.

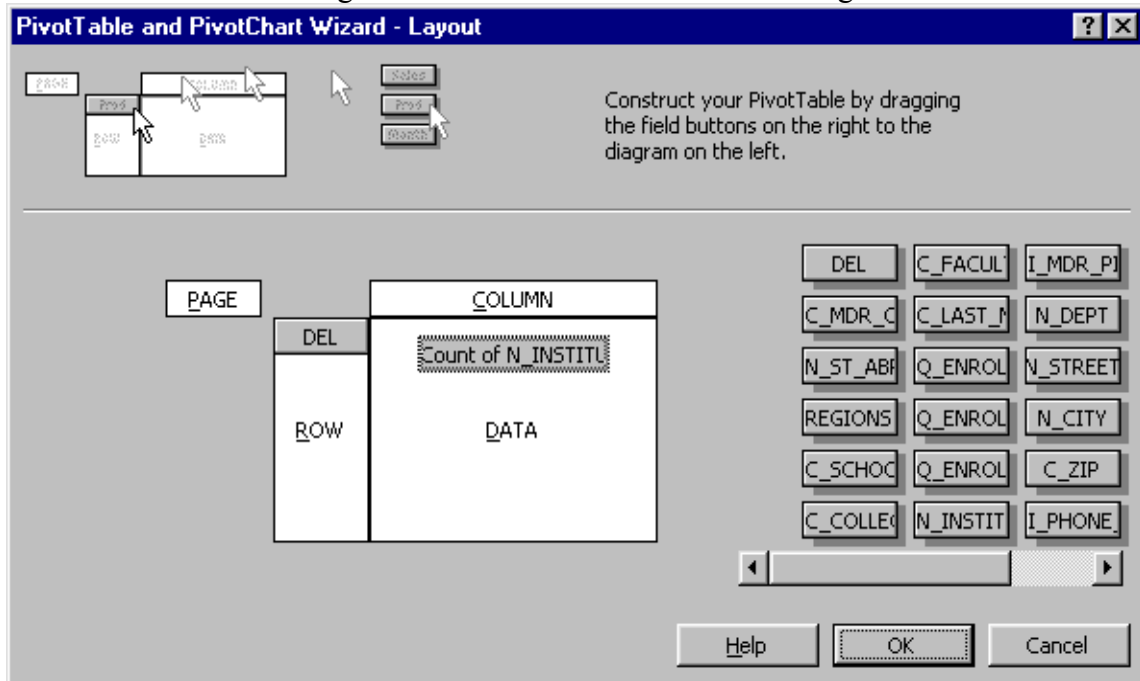
	A	B	C	D	E	F	G	H	
	DEL	MDR	PID	NID	NAME	TYPE	ENROL	PHONE#	
1									
2	1	17078601000	01527403	00404	D MESSICK	2	0004710	316-665-3500	HUTCHINSON C
3	1	01037601000	01561095	00456	PROFESSOR SCHUTTE	4	0001531	205-226-4600	BIRMINGHAM E
4	1	04052601000	01561552	00087	T HOLLEMAN	2	0000837	870-574-4500	SOUTHERN AR
5	1	03002601000	01561899	00301	G PRATT	2	0004324	520-364-7943	COCHISE COLL
6	1	03008601000	01562025	00002	RICHARD E BAKER	2	0005573	520-757-4331	MOHAVE COM
7	1	05001615000	01562374	00622	E HOLLOWAY	2	0013130	510-786-6600	CHABOT COLLI
8	1	05010609000	01562714	00007	KENNETH COCHRAN	2	0003463	559-935-0801	WEST HILLS C
9	1	05015604000	01562855	00258	WAYNE SANDBERG	2	0004500	760-384-6100	CERRO COSO
10	1	05019649000	01563029	00816	A M DITTMER	2	0010000	626-963-0323	CITRUS COLLE
11	1	05019656000	01563213	00121	STANLEY C SANDELL JR	2	0007503	310-522-8200	LOS ANGELES
12	1	05019660000	01563249	00288	LEON STERN	2	0015960	818-781-1200	LOS ANGELES
13	1	05019663000	01563354	00186	PATRICK L SHIELD	2	0011834	562-692-0921	RIO HONDO CC
14	1	05019685000	01563574	00010	MADelyn CREIGHTON	2	0001021	310-377-5501	MARYMOUNT C
15	1	05030606000	01563794	00115	RIC GORNO	2	0013148	714-484-7000	CYPRESS COL
16	1	05030616000	01563926	00487	C M HENRY	2	0010500	714-546-7600	COASTLINE CC
17	1	05034603000	01564047	00274	LINDA K REYNOLDS	2	0016039	916-558-2441	SACRAMENTO
18	1	05036606000	01564126	00978	D ANGELO	2	0010500	909-888-6511	SAN BERNARD
19	1	05037607000	01564188	01087	T SMITH	2	0015920	619-644-7000	GROSSMONT C
20	1	05037624000	01564243	00102	FREDERICK C LOTZE	2	0016640	619-421-6700	SOUTHWESTE
21	1	05041606000	01564645	00166	ROANLD F TRUGMAN	2	0005400	650-306-3100	CANADA COLL
22	1	05043607000	01564750	00244	WILLIAM THOMPSON	2	0016000	650-949-7777	FOOTHILL COL

EX. C

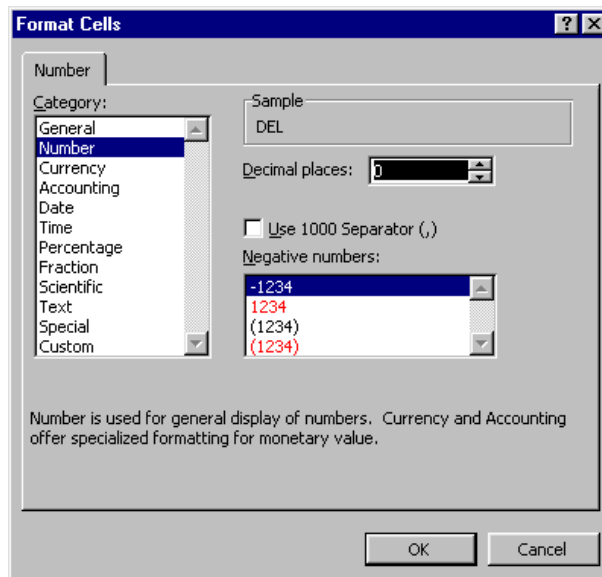
- a. Go to DATA, then to PIVOT TABLE REPORT. Prepare the Layout as follows:

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The Del or Delete button goes to the ROW box. Schools button goes to the DATA box.



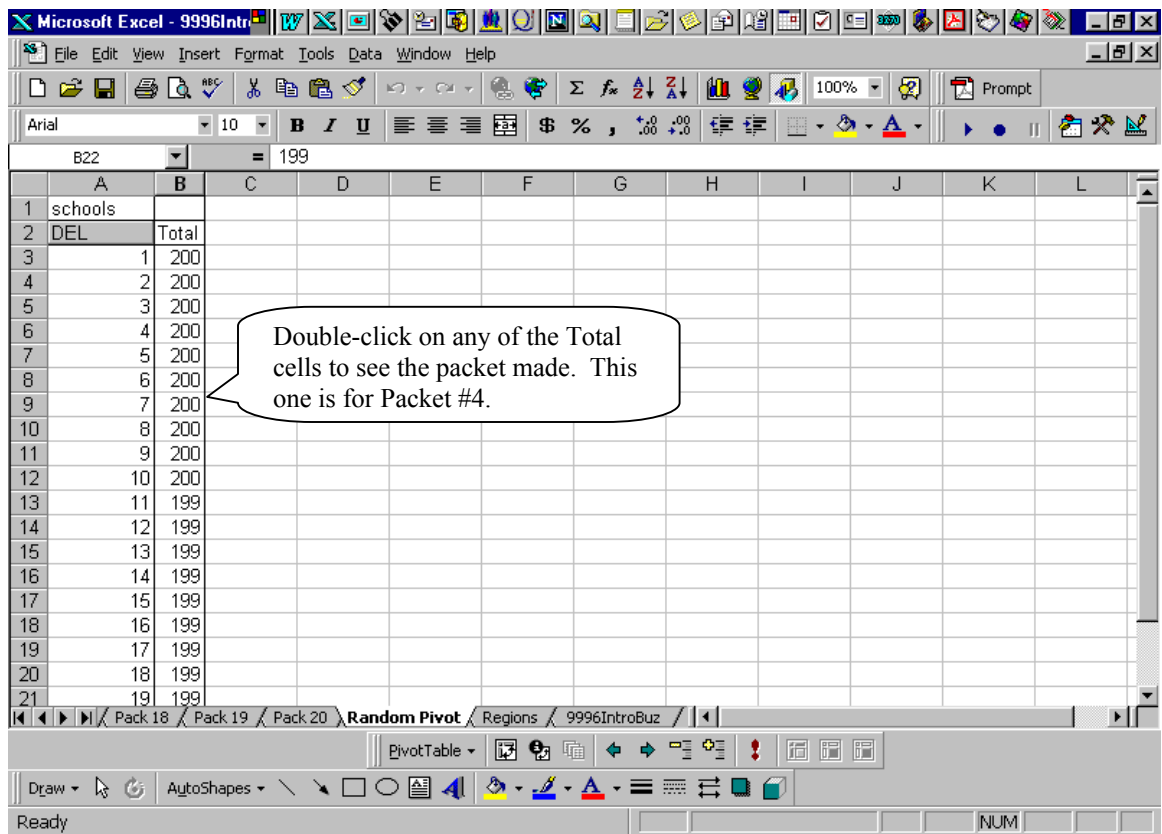
- b. Count of Schools can be edited when you double-click on that button. The Count becomes a number with no decimal places.



- c. Then click “ok” and once again, “ok” to close out of the edit mode.
- d. Click on FINISH to see the final packet pivot table.(See example D) See example C for the finished sort.

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- e. To see your pack data and to pull it into a separate worksheet, double-click on the first totaled amount for the Number 1. The total amount which is automatically split evenly as possible throughout the worksheet represents the total entries for each pack. Make as many packs as needed for the total in the survey.



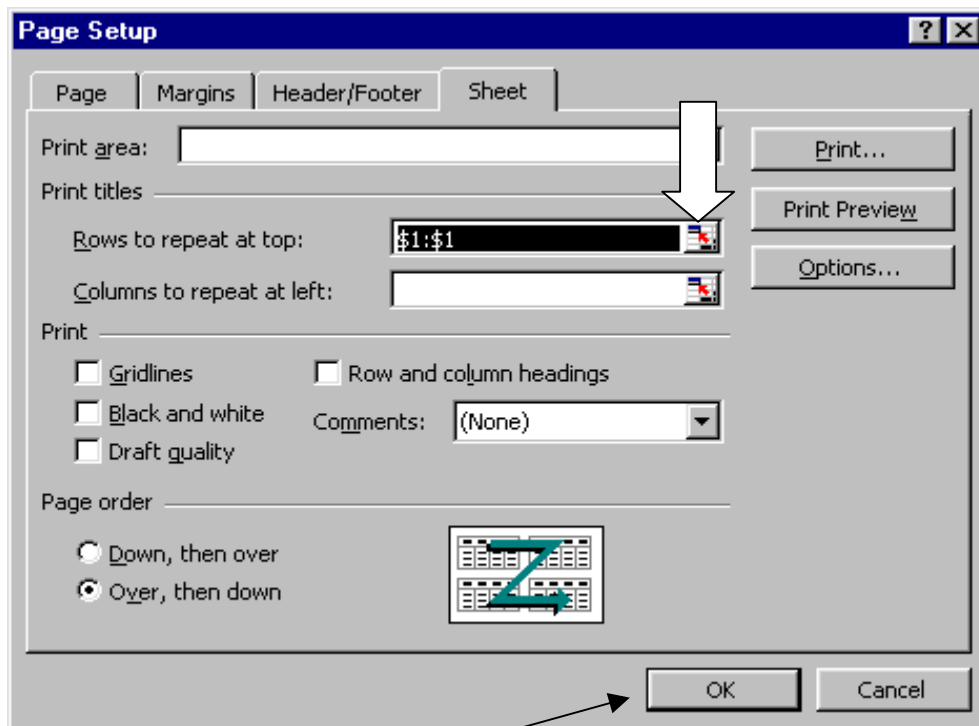
EX. D

To format pages for single entry print-out (header + 1 person entry):

1. Click on the tab for Pack 1. Holding down the Control key, click on all the other tabs (Packs 2-20) to prepare for generic formatting. Hide unnecessary columns (A,B,D,G,J,P and Q) by selecting one column, hold down Control key and highlight the rest. Right-click your mouse and choose HIDE. Columns are now hidden on ALL packets.
2. Move back to upper left hand corner, choose FILE, and choose PAGE SET UP.
3. On the first tab, click Landscape, then Legal paper, and size down to 75%.
4. Click on Margins tab, make left and right margins at .25; make top and bottom margins at .75 with the header at .25. Then click at the bottom where it says HORIZONTAL.

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- Now click on Header/Footer tab. Drop down the footer box and select **Confidential, page # and date** string. Type in Market Intelligence Group on left side. Now select the header box and choose the file name. Then select CUSTOM HEADER, and click on the tabs icon which will insert the individual packet name underneath the file name. Highlight the codes, choose **bold** and **11 point** font.
- To finish out formatting on individual sheets, click on any one tab to deselect all the worksheet tabs. Starting with Pack 1, click on FILE, then on PAGE SETUP, and then click on the 4th tab (Sheet) on the right. Click on the right corner of the box for ROWS TO REPEAT AT TOP (see arrow below). The box disappears and you should select the header row of your worksheet.



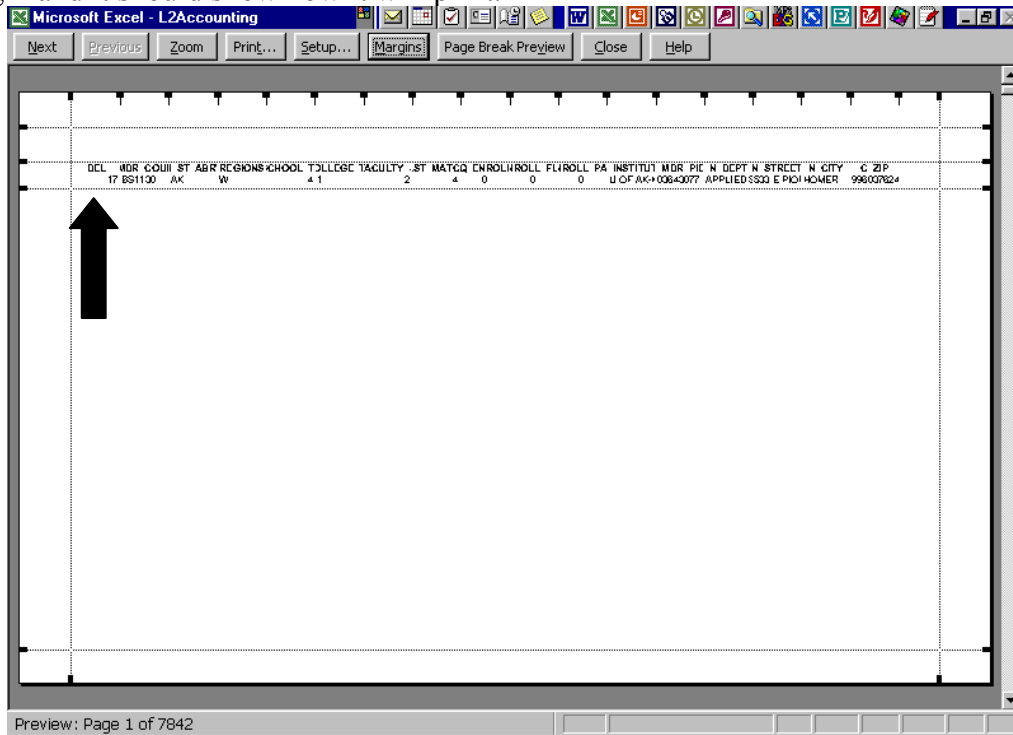
- Now click back on the small box at top to open up the box window again, and click on **OK**.



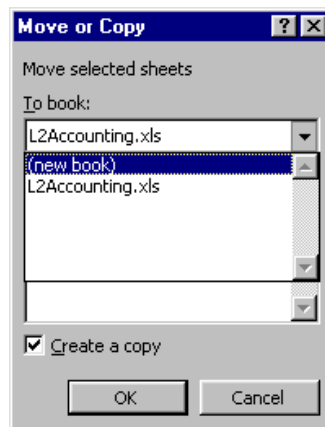
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Now click on FILE, then PRINT PREVIEW, then on MARGINS. Grab the bottom margin and move it up to just underneath the header and first name entry. Release the margin and it should show how it will print.



8. Close out this view and save file. Repeat above instructions for each Pack worksheet until all are done. To send packs to analyst or to vendor, COPY all packs to a new worksheet, zip up and send out. To do this, select sheets 1-10, right click on tabs and click the copy box, drop down window to move to new worksheet .



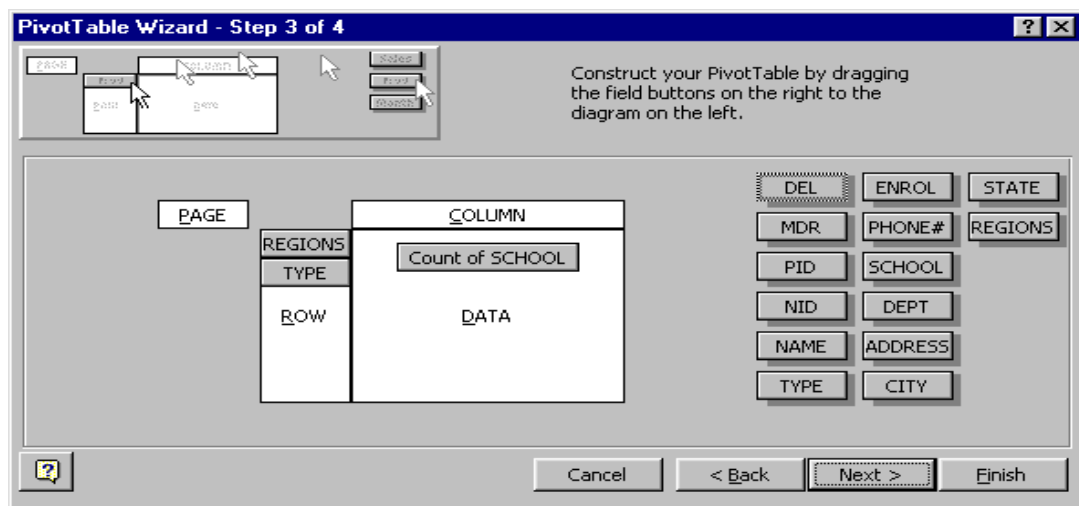
9. Repeat same for sheets 11-20 but copy these into the new workbook already carrying the other 10 sheets.

***** (End Part IV) *****

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Part V
Pivot Table Analysis for Region/2yr-4yr School Information

1. In an open Excel file, go to DATA, click on PIVOT TABLE REPORT
2. Click the NEXT button, then click NEXT again to go into the layout screen.
3. To build your layout pivot table, drag and drop the following:
 - a. Move the **Regions** button to the ROW box.
 - b. Move the **Type** button to the COLUMN box. Rename (by double-clicking the box) as School Type, if preferred.
 - c. Move **School** button to the DATA box



1. To Edit – double-click on COUNT OF SCHOOLS button.
2. Edit the button name in the highlighted box.
3. Click on **Number** button, then on NUMBER; put **Decimal** places to 0 (none) and check-mark the box for the **1,000 separator**
4. Click **Okay**, then **Okay** again to get back to the layout screen.
5. Click **Finish**.
6. At the top of the page, insert two rows, then drag and drop the **Type** button underneath the **Regions** button. Now we are ready to calculate the resulting columns of numbers. (see **Part VI**)

(Note: It's always a good idea to make a picture copy of your layout screen by hitting ALT + Print Screen(copy), then opening a blank Word document (or Lotus Notes e-mail) and **Pasting** the copy job into the page.)

*******(End Part V)*******

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Part VI – Analysis for Regions and School Type

1. Type in column header names on the right side of the “Total” column.
 - a. % of Total
 - b. % of Regions

	A	B	C	D	E	F	G	H	I	J	K	L
1												
2												
3	Count of SCHOOL											
4	REGIONS	TYPE	Total	% of Total	% of Regions							
5	C	2	677	17%	64%							
6		4	379	9%	36%							
7	C Total		1,056	26%								
8	E	2	377	9%	53%							
9		4	329	8%	47%							
10	E Total		706	18%								
11	S	2	881	22%	66%							
12		4	459	12%	34%							
13	S Total		1,340	34%								
14	W	2	693	17%	78%							
15		4	195	5%	22%							
16	W Total		888	22%								
17	Grand Total		3,990	100%								
18												
19												
20		2 yr	=	66%								
21		4 yr	=	34%								

2. Type in the following formulas. In “% of Total” column, type = , then click on the required cell (1st cell of the 2yr schools in the 1st region; ie 69 as in Exhibit B); then a division slash; then type in the Grand Total number. The final formula should read =C5/3990.
DO NOT USE COMMAS OR OTHER SEPARATORS. FORMULAS DO NOT RECOGNIZE THESE.
3. Once the formula is entered in, then copy/fill that formula down to the Grand Total line. The last number should read 100% as the Grand Total number will divide itself by its own number.
4. Format that column by highlighting the column, then going up to FORMAT, then to CELLS. Click on NUMBER, and change to PERCENTAGE, then remove all decimal places.

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5. In the next column over, for the **% of Region**, the formula is =; click on the first cell (1st 2-yr school), type a forward slash /; then click on the **Region's** Total Cell. The final formula reads =C5/C7. Repeat for the 4-yr school, to read =C6/C7. Then skip down one cell into the next region and repeat that formula set-up. =2yr/Regiontotal and =4yr/Regiontotal. You cannot do the fill/copy command for this formula. It must be hand-built.

REGION	TYPE	Total	% of Total	% of Regions
C	2	677	17%	64%
	4	379	9%	36%
C Total		1,056	26%	
E	2	377	9%	53%
	4	329	8%	47%
E Total		706	18%	
S	2	881	22%	66%
	4	459	12%	34%
S Total		1,340	34%	
W	2	693	17%	78%
	4	195	5%	22%
W Total		888	22%	
Grand Total		3,990	100%	
	2 yr	=	66%	
	4 yr	=	34%	

Exhibit B

6. The last step for the 2yr/4yr analysis is the following:
- a. Several rows beneath the pivot table, type in 2yr, then 4 yr underneath it. Type in the = sign after both.
 - b. Then type in the following formulas respectively. 2yr=(D5+D8+D11+D14) and press ENTER.
 - c. Do the same formula for the 4 year. 4yr=(D6+D9+D12+D15) and press ENTER. See Exhibit B for the final appearance.

***** (End Part VI) *****