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OVERVIEW

This section gives an overview of the system. The **HANDS-ON (MASTER TABLE)** and **HANDS-ON (RELATED TABLE)** sections give step-by-step instructions on how to set up and use the system.

Before opening any files sent to you, you must:

1. Get Filemaker Pro 8.5 installed on your computer.
2. Ensure Timbuktu is installed on your computer to allow remote access.
3. Make a copy of the **Master Template** and name it **Master**. (Do not worry about error messages—these will be fixed by David Fink, the Corporate Director of Research.)
4. Make a copy of the **Related Template** and name it **Related**.
5. Call David Fink and have him reset the paths for the **List Prefs** in both tables and the path of the **Master (OSXEMAILFAXING 2)** in the **Related** to reflect your computer's folder system.

The basic concept for this database system, as outlined in the **Research Director's Guide**, is to maintain consistent information, such as business names, addresses, contacts, etc. in one database called the **Master** and inconsistent information (changes every year), such as number of employees, revenue, etc. in separate databases called **Related**. Each **Related** database contains the information for one list and is linked to the **Master**. The link allows the master business data to be published with the list data.

Another way of describing this system is that it is a **relational database system** with multiple (related) **tables** linked to a master **table**. All the tables together are referred to as the database. This is also how it is referenced in Filemaker Pro 8.5 (FP), the software version this system uses. To ensure everyone talks the same language, from now on we'll use relational database language. That means that what was once labeled a database is now a **table** and the whole collection of tables is the database.

This system was developed to eliminate having different (and sometimes incorrect) information appear when a company is on more than one list. In the old system when a company was on more than one list all company data had to be in each list's table. Corrections did not always get to every involved table. Under the new system, updates are made once in the **Master**. In addition, an email campaign such as nominations for Women of Distinction is sent from one **Related** table using all the companies in the **Master**, not sent from 50 tables.

Each business in the **Master** table is a **record** (a group of data about that one company). Each bit of data in that record is in a different **field**. For example, the **Master** business record has data fields for the business name, address, city, state, etc. Data in each **Related** table is also a **record**. For example, the number of employees, offices, and revenue for one business is a **data record**.

Data records in multiple **Related** List tables that refer to one business in the **Master** will be linked to the single business record in the **Master**. For example, employment data for a bank in the **Related** Employers List and deposits data for the same bank in the **Related** Banks List would be linked to that bank's company data in the **Master**. When layouts in the **Related** tables are opened, the links bring in the **Master** data such as name, address, phone numbers, etc.

Keep in mind that each year the previous year's **related** data (but not **Master** records) is updated or deleted. To maintain historical records, keep the **Master** and **Related** List files as the current year and make a copy of the folder as the previous year, i.e. **Database Master 2007**. Note that when you change the name of the folder, the path to the **Master** must also be updated. David Fink can assist you. (Take notes for future years.)

Master Table Layouts

Open the **Master** table (**Research/Database Masters/Research Master**). The first layout is titled **General**. Once open, the other layouts related to the business record can be accessed by clicking on the tabs: **Contact**, **Profile**, **Notes**, and **Misc**.

1. **General** holds all the company information such as address, telephone, web site and top contact. In the old system, this data was in the **Data Entry** and **Data Entry2** layouts.
2. **Contact** holds all the survey contact person information. In the old system, this data was in **Survey Contact**.
3. **Profile** has three sections:
 - a. List categories. Within each category are the names of specific lists. For example, **Banking and Finance** contains list names for **Accounting Firms**, **Angel Investors**, **Banks**, **Credit Unions**, **Mortgage Brokers**, etc.
 - i) While the list of specific list names is extensive, it is not all-inclusive. For example, Freight Forwarders, a list East Bay published January 26, 2007, was not in the list names with the original **Master** file. Therefore, this new list name profile needed to be added. How is explained in **HANDS-ON (MASTER TABLE)**.
 - ii) Clicking on a category changes the layout name in the **Layout:** list to that category's layout and displays all the list names associated with that category. Clicking on a list name does not change to a new layout because list names are links to scripts (programming language) used to link the **Master** records to lists where the companies appear.
 - b. General. Allows you to designate the company as public, private or non-profit, very useful for searches across lists.

- c. **Status**. Allows you to inactivate a company when it has gone out of business in East Bay. Inactive means it will not be found when doing a search. However, since it is still in the table it prevents your adding the company when you download bad data from sites, such as Nexis, that provide information on multiple companies.
- d. To get back to the **Profile** layout and the tabs, click the **Profile** tab.
4. **Notes** is the same as the **Notes** field in the **Survey Contact** layout in the old system.
5. **Misc.** is for the Marketing and Human Resources Contact information (formerly in **Data Entry 2** layout in the old system).
6. **Import Screen** is used to compare and decide which duplicate company record to delete.
7. **Search** is used to Find specific list records. This is updated with new list names when the **Profile** layouts are updated.
8. **Changes Record** notes when that record was changed and who changed it.
9. **Profile Worksheet** is used to update the **Profile** and **Search** layouts with new list names.

Related Table Layout

Keep the **Master** table open and open the **Related (Research/Database Masters/Related)**. Note that many of the layouts in the **Related** table are very similar to the old system. This is because all the activity relative to creating a list will occur in the **Related** table. This includes emailing and faxing surveys, creating the list for publication, uploading/entering data from the online surveys, and uploading data to the eBiz server.

In this section, we'll identify each layout and what it will contain after you complete the **HANDS-ON (RELATED TABLE)** section. The layout that appears when this file is opened is titled **Survey Contact** and the layouts will be discussed in order. Layouts are accessed by clicking on the down arrow at the **Layout:** dialog box and clicking on the layout.

1. **Survey Contact** and **Contact List** are the same as the old system. How to delete the **Fax** and **Email Sent** dates and Find records that need to be re-emailed or re-faxed is addressed in the **HANDS-ON (RELATED TABLE)** section.
2. **Data Entry** has the same business-related data as the old system (name, address, etc.) but now allows pre-populating data for contact information and data specific to the list. The variable data fields on the layout are nonspecific fields with labels that are relabeled for each list. Some fields, such as **Employees**, **Revenue**, and **Specific Business Services** are standard through all the lists. How to label fields to make them unique to your list is in the **HANDS-ON (RELATED TABLE)** section

3. **Data Entry 2** is laid out the same as the old system. However, it is not populated from the **Master** and there is a **Copy Info** button in each contact section that doesn't appear to do anything. Since contact changes should be made in the **Master** and not the **Related**, we suggest this page not be used.
4. **Email Survey** is the same as the old system.
5. **Fax Survey** has the same fax layout as the old system but the attached survey pre-populates the form with the business name, address, contacts, etc. Survey question labels have to be edited to reflect how the fields are being used in **Data Entry**.
6. **Email Note** and **Fax Note** are the same as the old system.
7. **Web Survey Import** and **Web Survey Import 2** are new layouts that address the problem of data imported from the on-line survey system overwriting or eliminating existing data that should not be changed. For example, a company address might be overwritten by a mailing address, which is not an address used in the lists. In these layouts you can check what you want imported.
8. **List Export** will need to have the list specific headings and fields layout copied from each old table to the layout in each new **Related** table.
9. **Ebiz Lists export** requires an extra step from the old system but is otherwise the same.
10. **Setup New List**, and **Labels** are the same as the old system.

The Linking Concept

Many fields in the **Related** table contain data taken from the **Master** table fields. You can verify this by going to a **Related** table and using the **Survey Contact** layout. Click on **View, Layout Mode**. Note that the **SContactFirst** field name (or any field in the **Survey Contact**) is preceded by two colons :: and the table name **OSX EMAILFAXING 2**. That is the real name of the **Master** table and that is where the system is going to get the data. However, the system needs to know which business records to use for this **Related** table. This is accomplished through a two-step linking process.

1. The business name in the **Master** table is linked to each list in which it appears. These links then allow you to **Find** the companies related to a list.
2. After finding the companies related to a list, their unique ID numbers are imported into that List's **Related** table.

Now that you hopefully understand the basics, it's time to get to work.

HANDS-ON (MASTER TABLE)

Setting Up List Names

As noted, most list names are already set up in the **Master**. However, a new list means the name of the new list has to be added to the **Master**. This is so the companies to be contacted (or analyzed without contact) for inclusion on the new list can be added to the **Master** and identified by their list affiliation. Keep in mind that companies already in the **Master** may also apply to this new list so part of your work in building a list of companies is already done for you. With companies already in the table, you only have to update their profile.

Adding a new list is really:

- Adding a field for that new list,
- Adding two scripts (programs) that tell FP what to do when labels representing those fields are selected then
- Linking the labels and buttons to the right field and scripts.

If you have imported records and a **Search** for those records does not work, the list name (label and buttons) you are using may be linked wrong. Using the instructions below will enable you to fix the problem.

Once you understand the process (why you are clicking and changing things and what those changes are doing) and how to change and link layouts, you may want to evaluate the categories and lists within categories with the objective of rearranging/combining/eliminating to better meet the needs of your market.

For this instruction, I added **Freight Forwarders** as a new list name. Follow these steps to add other new list names as needed.

1. In the **Master** table, open the **Profile Worksheet** layout.
2. Click the **Create field for new list name** button.
 - a. If the **Fields** screen does not appear, click the **Fields** button at the top.
 - b. Type the name of the new list, in this case, **Freight Forwarders In**. The **In** means the company is in that list group.
 - c. Be sure that **Type** is **Text**. If not, click the down arrow and select **Text**.
 - d. Click **OK**. At the message **Save changes**, click **Save**. The new field with a label will appear at the bottom of the existing list of names.

3. Click the **Create profile script for new list name** button.
 - a. Find the **Change List Status Button (Template)** script and duplicate it.
 - b. Select the duplicate and click on **Edit**.
 - c. The script name is at the top. Delete the word “**List**” and enter the name of the new list, in this case **Freight Forwarders**. Delete **(Template) Copy**.
 - d. Look in the dialog box right below and select the second line.
 - e. Click **Specify**. The line appears in a field dialog box.
 - f. Highlight **OSX** to the end of the word **In**.
 - g. In the field list find the new list field name and double-click it. It will replace the old field name in the script. Click **OK**.
 - h. For the next line, starting with **Set**, when the line is selected a checked box **Specify target field** appears. Select **Specify**.
 - i. Find the new list field name and double-click it. Click **OK** and repeat for the next **Set Field** line in the script.
 - j. Click **OK** to return to the list of scripts.
 - k. Find the **Find List Surveys (Template)** script and duplicate it.
 - l. Select the duplicate and click on **Edit**.
 - m. The script name is at the top. Delete the word “**List**” and enter the name of the new list, in this case **Freight Forwarders**. Delete **(Template) Copy**.
 - n. Look in the dialog box right below and select the third line.
 - o. A checked box **Go to target field** appears. Select **Specify**.
 - p. Find the new list field name and double-click it. Click **OK**.
 - q. Go to the next line. The same checked box appears. Select **Specify**.
 - r. Find the new list field name and double-click it. Click **OK**.
 - s. Click **OK** to leave that script.

4. Follow the instructions for **Completing this page**.
5. Click the **Update Profile screen with new list name** button.
 - a. Click on the category the new list name will be in.
 - b. Click **View, Layout Mode**.
 - c. Make room for the new name to be in the list alphabetically by using the pointer to draw a box around all the labels and buttons to be moved then move them down. You may have to make all the background screens longer to fit the names.
 - d. Click on a list name label and use **Shift** to click on the label's button. Press **Apple+C** to **Copy** then **Apple+V** to **Paste** immediately.
 - e. Move the label/button to their proper position and rename the label with the new list name.
 - f. Double click the button. Select the new field name from the list in the right dialog box and click **OK**. In this example, I would select **Freight Forwarders In**.
 - g. Double click the label.
 - i) On the left is a dialog box with **Control** and below it **Perform Script**. Ensure **Perform Script** is selected.
 - ii) On the right is a box with **Pause** and next to it a box with **Specify**. Double click **Specify**.
 - iii) Select the new list script Change...Status Button. In this example, I would select **Change Freight Forwarders Status Button**.
 - iv) Click each **OK** button that appears.
 - h. Click **View, Browse Mode**. At the prompt, click **Save**.
 - i. Double click **All Lists**, change to **Layout Mode** and follow the above steps (step 5 only) to add the new list name to the total list.
6. Click the **Search** button at the top of the screen.
 - a. Click on the category the new list name will be in.
 - b. Click **View, Layout Mode**.

- c. Make room for the new name to be in the list alphabetically by using the pointer to draw a box around all the labels and buttons to be moved then move them down. You may have to make all the background screens longer to fit the names.
- d. Click on a list name label and use **Shift** to click on the label's button. Press **Apple+C** to **Copy** then **Apple+V** to **Paste** immediately.
- e. Move the label/button to their proper position and rename the label with the new list name.
- f. Double click the button. Select the new field name from the list in the right dialog box and click **OK**. In this example, I would select **Freight Forwarders In**.
- g. Double click the label.
 - i) On the left is a dialog box with **Control** and below it **Perform Script**. Ensure **Perform Script** is selected.
 - ii) On the right is a box with **Pause** and next to it a box with **Specify**. Double click **Specify**.
 - iii) Select the new list script Change...Status Button. In this example, I would select **Find Freight Forwarders Survey**.
 - iv) Click each **OK** button that appears.
- h. Click **View, Browse Mode**. At the prompt, click **Save**.

Importing Company Records from a FP Table

Before importing records from a table into the **Master** table, the old tables should be clean. This means no duplicates, no records with missing addresses, missing email addresses, contacts, etc. As more records are brought into the **Master**, more duplicates will appear through the merging of separate tables. It is very difficult to deal with these duplicates if the original databases also have numerous duplicates. It is also difficult to work with thousands of records missing essential data as opposed to working with 100 to 300 at a time in the existing tables.

After cleaning the databases (see **Research/Procedures/Filemaker Pro Hints**) do the following to import the records into the **Master**:

1. Convert the old table to FP 8.5 by dropping it into the FP 8.5 icon. At the conversion dialog box, click **OK**. Save the converted table in the same folder as the Old file.
2. With the **Master** open, click **File, Import, File**.

3. In the **Show:** box, click the down arrow and select **Filemaker Pro Files**. Double-click the table to be imported.
4. If you see a “**List Prefs could not be opened**” message, click **OK**. When the folder lists appear, click **Cancel**.
5. At the field import screen the fields in the imported table (on the left) and the fields in the **Master** (on the right) are displayed. The first import should have the lists **Arranged by: matching field names** (middle right on the screen). There will be arrows pointing to the right on the matching names. Some of these arrows may need to be changed to **Don't import this field** by clicking on the arrow once. The only fields to be imported are:
 - a. SContact...
 - b. TopContact...
 - c. MktgContact...
 - d. HRContact...
 - e. Business...
 - f. URL
 - g. ListName and ListPrintDate
 - h. EmailCC and EmailBCC
 - i. NOTE: Once you set the fields to be imported, the next import should display **Arrange by: last order** or **custom import order**. This means the previous alignment is being repeated and you should not have to click on any arrows.
6. Click **Import**. At the next screen, check **Perform autoenter options...** then click **Import**.
7. At the **Import Summary** screen, click **OK**.
8. Note that the imported records each have a unique ID number starting with 1000. These ID numbers are used to identify the linked data that will be used in the lists. The imported records will display as **Found** records.

Importing Company Records from an Excel Spreadsheet or Text File

See **Filemaker Pro Hints, Preparing Data for Import into the Master File** before importing anything.

1. Click **File, Import Records, File**.
2. In the **Show:** dialog box, change the format to **Excel files** or **Tab-Separated Text Files**. [Note, do not use the default **DIF** as FP cannot recognize the headings in that format therefore anything imported would be a mess.]
3. Click on the file to be imported then click **Open**.

4. If the file has more than one worksheet, click on the worksheet to be opened and click **Continue**.
5. FP can read and match headings only in another FP file. Therefore, you have to match the headings by clicking on a heading on the right side of the lists and dragging it to match the heading on the left side. Be sure the arrow is pointing to the right between both headings.
6. When finished matching the headings, click **Import**.

Assigning Companies to a List Profile

Since the newly imported records are grouped as a Found set, it is faster to assign profiles first then delete duplicates and reassign profiles as needed.

Note: Nexis generally lists a subsidiary of a publicly-traded company as private even though the parent is public. EBBT regards the company as public. Verify company public-private statuses before continuing this section.

1. Be sure you are at the first records in the **Found** set. Click the **Layout:** drop-down list and select the **General** layout.
2. Click the **Profile** tab.
3. Check either the **Public**, **Private** or **Non-profit** button. The number **3** appears in the label. Use **Ctrl+Down Arrow** to move through the names and the mouse to click on **Public**, **Private** or **Non-Profit**. If you want to uncheck something, click it again.
4. Go back to the first record in the **Found** set.
5. Click the category for the list.
6. Click the list name. The number **3** appears in the label. Use the same technique noted in step 3 to get through the list quickly.

Deleting Duplicates

To have the most updated information in each company record, you would think that deleting all prior records and adding the profiles of those records to the current record would suffice. However, it doesn't.

Some respondents think the survey is asking for a mailing address and will supply a post office box rather than the actual physical address. However, the physical address is what is used in the actual lists. Respondents may also not supply contact names assuming you have the old name. Therefore, saving what they provide may mean a blank where you once had a name.

A company name may not be a duplicate if the type of list influences the address or the Survey and/or the Top Contact. For example, if B of A is on the Largest Employer list, the data was probably obtained from HR or the Media group and the address most likely will be corporate headquarters since B of A has multiple facilities in East Bay. If B of A is on the Corporate Philanthropy list or the SBA Lender list, the addresses and contacts may be different. Since each record can contain only one Survey Contact, one Top Contact, etc. this company would need a separate record for each variation.

The newly added company might be on a list that does not have surveys (and therefore would not have contacts). That duplicate would be deleted and the company already in the table would be profiled with the deleted company's list profile.

To identify and delete true duplicates:

1. Open the **Import Screen** layout.
2. Display all records, **Records, Show All Records, Apple-J**.
3. Sort the records by **BusinessName**. (At this stage, the assumption is that you know how to sort records.)
4. At the far left of each company name is the list(s) it is on. Note that these are the lists the records came from **NOT Master** profiles. For records already in the **Master** you can assume they have been profiled and the **ListName** is also the profile checked.
5. For duplicates, check if contacts and business addresses are the same.
6. Click the **Layout:** drop down list and select the **Misc.** layout. Click **View, View as Table**. Verify that the contacts here are the same.
7. If they **are** the same in the **Import Screen** layout and the **Misc.** layout, delete the **NEWLY IMPORTED** company and add the deleted company's profile (list name) to the company left in the table.
8. If they **are NOT** the same in the **Import Screen** layout and/or the **Misc.** layout, determine if the differences are from actual changes or because the list being used dictates different addresses, contacts, etc. If the differences are due to the list, this is a new, independent record. You only have to profile it.
9. If the differences are due to actual changes, you have two options.
 - a. Option 1.
 - i) Update the OLD company record (the one already in the table) with the new information.

- ii) Delete the newly imported record.
- iii) Add the profile (list name) of the newly imported company to the company left in the table.

OR

b. Option 2.

- i) Note what profiles are attached to the OLD company record.
- ii) Delete the OLD company record.
- iii) Add the profiles (list names) of the old company to the newly imported company.

HANDS-ON (RELATED TABLE)

Overview

In designing a database system, ease of use and continuity are prime considerations. The system should be usable by all Researchers regardless of the level of software sophistication. Definitions should be consistent across all list types. For example, the local employees field might be **EmployeesLocal** for everyone.

To build in ease of use, the Researcher should not have extensive work in creating fields and manipulating layouts. That can be addressed by having nonspecific fields already in the template that can be linked to layouts copied and pasted from the old tables. To build continuity, the template would need generic fields, such as **EmployeesLocal**, that met the needs of all the lists. Due to time constraints, we were able to build in the nonspecific fields but not generic ones. That will be addressed down the road as more Researchers move to the one database system.

In this system, some critical fields have specific names and specific uses. Other fields are named with letters, i.e. **Field Value A, Field Descriptive B**. What you will do as you develop each list is identify the fields in **Data Entry** with the data that they will hold, enter the data then link the fields to the **List Export** layouts so the data can be displayed. When a generic field list is developed for everyone, you will link **Data Entry** and **List Export** with the new field names.

Fields in the Related Table

This list discusses only those fields that may be confusing. Many are in the old databases but may have been used differently or were not fully defined. Some definitions have also been entered as Comments in the table Fields list. To see the Comments in the Fields list, toggle the Options/Comments line in the Fields Screen.

| FIELD NAMES | USE |
|---|--|
| Business, Scontact, TopContact, MktngContact and HRContact related fields | Provide fields for linking field data from the Master . |
| CityZip | Displays Business City and Zip with no commas. |
| County | Available if you need to define data by county. |
| Date | For year founded, fiscal year, etc. |
| Date2 | To indicate second year if two years are being compared. |
| Employees | Company-wide only. Replaces Employees ebiz export field in the Ebiz Export layout. |
| Field Descriptive A to Field Descriptive D | Used for descriptions specific to list. |
| Field Value A to Field Value H | Used for values specific to list. |
| Footnote Field | Used in Data Entry for company information such as merged, closed, etc. Can be added to the List Export layout in the footer. |
| Full Name | Displays top executive name with title underneath. |

| FIELD NAMES | USE |
|-------------------------------|---|
| ListName | Name of the list. |
| PrimaryRankCriteria | Text description of what the list is ranked on. |
| PrimaryRankField | Always equal to RankValue field. |
| PriorRank | The order of ranked entities on the prior year's list. |
| Rank | The order of ranked entities and manually entered. |
| RankValue | The field with the value used for ranking. |
| Revenues | Company-wide only. Replaces Revenues ebiz export field in the Ebiz Export layout. |
| SecondaryRankCriteria | Text description of the field used to break ties. |
| SecondaryRankField | Currently not used but can be made into a calculated field to equal the secondary ranking criteria. |
| Services Business Description | Use to describe main services, specialties. Replaces Business description services offered ebiz export in the Ebiz Export layout. |

Setting up the Related Template Table for Your Newspaper

1. Open the **Research Master** (or whatever you have designated as the name for your master table).
2. Open the **Related Template** and make a copy as **Related**.
3. Change the path in **Related** to the **Master**.
4. Open the **Fax Survey** layout.
5. Delete the existing journal logo in the fax cover and the survey.
6. Copy your logo/address from the old list database into the fax cover and the survey.
7. At the message on saving your changes, click **Save**.
8. At the bottom of the survey, change the name, phone, etc, to yours.
9. Repeat these steps for the **Fax Note** layout.

NOTE: Do not change the “saving your changes” message to be automatic. While an extra step, it provides a margin of safety when you accidentally delete large areas of a layout.

Setting up the Related Table for a List

1. Copy and save the **Related** table in the name of the list being created. For example, **Related MBA Programs**.
2. Open the old list database.
 - a. Go to the **Setup New List** layout and write down what was entered for **List Name**, **Primary Rank Criteria**, and **Secondary Rank Criteria**.
 - b. Go to the **List Export** layout and click **View, Layout Mode**.
 - c. Click on each field in the body of the layout and write down the field name.
 - d. Go to the field list (in FP 8.5 **File, Define, Database, Fields** tab; in FP 6.0 or less, **File, Define Fields**). At the top right, **View By:**, click the down arrow and select **field name**.
 - e. Check your list against the field list. If any field on your list is a calculated field, write down the fields being used in the calculation. If the field is a number or date field, the data for the field(s) will have to be entered and formatted manually as all the nonspecific fields in the **Related** table are text.
 - f. Open the **Fax Survey** layout and print the survey.
3. Open the **Related** table and verify the fields.
 - a. Click **File, Define, Database, Fields**. Verify and check off the fields from your field name list that are already set up in the **Related**. For example, if the old **List Export** has **Business Name**, this is already a field in the **Related** table and would be checked off your field name list.
 - b. If some of your fields are calculated, such as combining the city and state, look for fields in **Related** that accomplish that task. If none do you have two choices:
 - i) Manually enter the data from the calculated field into one of the nonspecific fields, or
 - ii) Change a nonspecific field to a calculated field and copy the calculation from the old database field to the **Related** table. *[This assumes the calculated field uses fields that are in the **Related** table. If it does not, you must enter the data manually.]*
4. Go to the **Setup New List** layout. Enter the data in the top three fields that was copied from the old database.

5. In the **Related** table, open the **Data Entry** layout and change to **View, Layout Mode**. Do not change to any other View mode until this section is complete.
 - a. For each field on your list that is unchecked, select one of the nonspecific fields. For fields with predefined data as noted in the field chart above, do not change the labels.
 - b. Change the field label to reflect the data that will be stored in it.
 - c. Note the field name next to its data field on your field list.
10. Open the **Email Survey** layout. Copy the body of the Email in the old database to the body of the Email layout in the **Related** table.
11. Open the **Fax Survey** layout.
 - a. For the fax cover sheet, copy the body of the cover sheet from the old database to the body of the cover sheet in **Related**.
 - b. The first line of the survey asks the recipient to update information as needed. This line can be changed to reflect how you are pre-populating the fields. In the first year, the survey will be pre-populated with static company data (name, address, contacts, etc.) In the second year, the survey will also pre-populate with the variable data. It is hoped that the less recipients have to write (or the more they see wrong), the more likely they will send the survey back. You can delete whatever you do not want pre-populated. If you have expertise, you can also delete the field names that are pre-populating the survey fields.
 - c. The bottom part of the survey (**Questions**) asks for the variable data
 - i) When you open the layout, all the available nonspecific fields are in this section. As a result, this section appears to encroach on the **Future Contact** section. However, it is expected that you will use only the fields and labels needed for your list, delete the rest and readjust the field and label locations to fit in the **Questions** section.
 - ii) Each label and field has its counterpart in the **Data Entry** layout. Therefore, assign each field and label in this layout with the same label as the **Data Entry** layout. The wording can be changed to a question if desired.
 - iii) As an example, if you used **Field Value A** as **Passengers Prior Year**, you could label **Field Value A** in the survey layout as **Passengers Prior Year** or as **How many passengers last year?**
12. Go to the **List Export** layout and change to **Layout** view. Do the same in the old database.

- a. Adjust the **Header** and **Body** sizes to fit the old database configuration. Enter lines in the **Header** and **Body** as needed to reflect your newspaper's formatting.
 - b. In **File, Page Setup**, change paper size to **Tabloid**.
 - c. In the old database, select all the column headings in the **Header** and copy them.
 - d. In the **Related** database, paste the column headings in the **Header** of the layout. Adjust the headings as a group as needed.
 - e. In the old database, select all the fields in the **Body** and copy them.
 - f. In the **Related** database, paste the fields into the **Body** of the layout. Adjust the headings as a group as needed. The fields turn blank since they do not link to any fields in this table. Linking is covered in the next step.
 - g. Check the rulers that the headings and fields are properly placed and aligned.
13. In the **List Export** layout, link each field to the **Related** OR **Master** table as follows:
- a. If the field you are linking starts with **Business**, **SContact**, **MktingContact**, **TopContact**, or **HRContact**, the data comes from the **Master**.
 - i) Double-click the field.
 - ii) At the top right of the field screen, at **Display Data from:** click the arrow and select **OSX EMAILFAXING 2**.
 - iii) The field names appear with two colons in front of each one. Select the field name needed and click **OK**.
 - b. If the field you are linking is a field with data unique to this list, such as **RankValue** or one of the nonspecific fields you assigned in step 4, the data comes from the **Related** table.
 - i) Double-click the field.
 - ii) At the top right of the field screen, at **Display Data from:** be sure it says **Current Table** ("OSX EM....
 - iii) The field names have no colons in front. Select the field name needed and click **OK**.

Preparing the Related Table—An Example

Once you import the company ID numbers from the **Master** into the **Related** List table much of the work with the **Related** table will closely mirror the old system. For this reason, this section will be an overview of the work involved in producing the **MBA Programs** list in the new system. The overview assumes you have made your field list from the old database.

1. Save a copy of the **Related Master Template** as **Related MBA Programs**.
2. In **Setup New List**:
 - a. Enter **Bay Area MBA Programs** in **List Name**, **Total MBA program enrollment** in **Primary Rank Criteria**, and **School name alphabetically** in **Secondary Rank Criteria**.

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TIFF (LZW) decompressor
are needed to see this picture.

- b. Click **Mark all surveys “Unsent”**. At the **This button will...** click **OK**.
3. In **Data Entry**, change the labels on the fields you will be using. For the MBA program:

| FIELD NAME | FIELD LABEL | LABEL CHANGED TO |
|-------------------------------|-----------------------------------|----------------------------|
| RankValue | Value to Rank List | Total MBA enrollment |
| Employees | Company-wide employees | Not used |
| Revenues | Company-wide revenues | Not used |
| Services Business Description | Business Description, Specialties | Sample concentration areas |
| Date and Date2 | Date and Date2 | Not used |
| Field Value A | Field Value A | Enrollment full-time |
| Field Value B | Field Value B | Enrollment part-time |
| Field Value C | Field Value C | Program cost in-state |

| FIELD NAME | FIELD LABEL | LABEL CHANGED TO |
|-------------------|--------------------|---------------------------|
| Field Value D | Field Value D | Program cost out-of-state |
| Field Value E | Field Value E | Average GMAT score |
| Field Value F | Field Value F | Faculty full-time |
| Field Value G | Field Value G | Faculty part-time |

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- a. **NOTE:** In this example, the value used to rank would not need to be displayed as text. Where a value will be displayed as text (4356000 as \$4.4 million), another nonspecific field would be used for that entry. The nonspecific field would NOT be used on the faxed survey but would be used (linked) in the **List Export** layout.
4. In **Email Survey** copy the email message from the old table and paste into the new email body.
5. In **Fax Survey:**
 - a. Copy the fax message and logos from the old table and paste into the new. **DO NOT COPY AND PASTE THE SURVEY.**

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- b. In the survey section, change the field names to those as in **Data Entry**. Delete unused fields and rearrange the fields and labels as necessary to fit in the outline.

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6. In **List Export**,

- a. Using Shift-Click, copy all the heading text boxes in the old MBA table as one unit and paste in the Header portion of the layout of the **Related MBA** table. Repeat for the fields except paste them in the Body of the layout.

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- b. Double-click each field and link to a field in either the current Related table (**OSX EMAILFAXING**) or the **Master** table (**OSX EMAILFAXING 2**).

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Using the Related Table

1. Linking the **Related** to the **Master**.
 - a. In the **Master**, ensure your **View** is **Browse** and **View as Form**.
 - b. Click the **Search** button at the top of the **General** screen.
 - c. Find the list name for the list being prepared, in this case MBA Programs. Click the list name. MBA program companies are now the found set.
 - d. In the **Related** table, click File, Import, File and select the Master.
 - e. When the file list appears, UNCHECK ALL FIELD MATCHES. MATCH ONLY THE **ID NUMBER** FIELD. After doing this the first time, the import order should stay on the **ID Number** field only for future imports on other lists.
 - f. Import the ID numbers.
2. At this point, working with the **Related** list is the same as working with lists in the old system. Below are a few pointers for those who are new to the Researcher position.
 - a. Verify all records have **Send by Email** checked (**Survey Contact** layout).
 - b. If a record is missing an email address, when the surveys are sent by email, the system will uncheck the **Send by Email** box. If an email address is found, this box needs to be rechecked to ensure the email will be sent in future mailings.
 - c. Once the emails are sent, use the **Contact List** layout to enter the date by clicking on the symbol under the Email column. (As of publication of this procedure, that

function did not work in the Related and needs to be investigated).

- d. When emails bounce, call or fax to get the correction. In the Contact List layout, click on the word Sent under the Email column to delete the Sent date. Then you can search for all companies with that date field being blank and resend to the Found set.

[In the **Survey Contact** layout, click into the **Email Date** field and click **View, Find Mode**. Enter a date range that encompasses the date or dates emails were sent. Click the **Omit** button and press **Enter**. The Found set will be all the companies with blank email dates.]

- e. Ranking.
 - i) Numeric data is entered as both raw numbers in the RankValue field and as text in the field displayed in the list. For example, 4311000 and 4322000 would both be entered in the RankValue as numeric but in the text/displayed field as \$4.3 million.
 - ii) This leads to companies that rank in numeric order appearing to rank the same. Therefore, when entering the rankings in the Rank field, companies with the matching text entries are given the same rank.
 - iii) The next company in line is given the numeric rank it would have if the numbers were used and not the text.
 - iv) The sort then requires the company name as the second criteria.
- f. For an Email Blast to all companies in the Master:
 - i) In the **Master**, **Show all Records**.
 - ii) Use the base **Related** table and import all the ID Numbers.
 - iii) Use the **Email Note** in the **Related** to send the Blast message.