Institute for Public Policy and Business Research
IPPBR Economic Modeling Group
Kansas Center for Community Economic Development
The University of Kansas

KANSAS BusinessFirst™
1998 Edition

of

IPPBR
ÆXSystems™
S**3
(Survey Support Software)

User Manual
Second Edition

1998 BusinessFirst™ Survey
Sponsored by *and* text authored by

KANSAS
DEPARTMENT OF COMMERCE & HOUSING
BUSINESS DEVELOPMENT DIVISION

ÆXSystems S**3
(Survey Support Software)
Conceived, Designed, and Written by Alexander Barket
Special KDOC&H Kansas *BusinessFirst* Version Sponsored by KDOC&H
Written by Alexander Barket, 1980-1998, at ÆXSystems and at IPPBR, the University of Kansas

Second Edition User Manual

By

Alexander Barket

January 1998
IPPBR Technical Report Number 40

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Information in this document and the underlying software are subject to change without notice.

Alexander Barket, ÆXSystems™ and The Institute for Public Policy and Business (IPPBR) at the University of Kansas jointly developed the *KANSAS BusinessFirst* version of the software for the KDOC&H.

Notice of License:

Foreword

By Alexander Barket, Author of this manual and author of the *Kansas BusinessFirst* software.

In the fall of 1996, the Kansas Department of Commerce & Housing (KDOC&H) partnered with the Kansas Center for Community Economic Development (KCCED) at both the University of Kansas' Institute for Public Policy and Business Research (IPPBR), and Kansas State University's Kansas Center for Rural Initiatives. This partnership set out to further develop a community-based business retention and expansion methodology. The methodology had evolved over time by the KDOC&H's Business Retention and Expansion efforts.

This partnership would set out to computerize the procedures where appropriate and possible. As part of the project, development of a whole training and turnkey methodology that incorporated the resultant software was specified. To bring this about required some "key-energies". Put another way, the right combination of expertise to accomplish the goals are needed.

These three "keys" were found in: the expertise of KDOC&H in the area of Business Retention and Expansion; the expertise if KCCED in training outreach efforts; and, finally, the IPPBR Modeling Group's expertise and resources in computer-aided survey and assessment techniques.

The First Edition of the software was demonstrated on January 25, 1997 at the KDOC&H offices. The next time the software was demonstrated was some time in May. By then, most of the BusinessFirst Survey had been prototyped into the system. Over 4000 individual pieces of information were placed into the control database to activate the long survey alone.

The months of testing the First Edition culminated with a training session in October of 1997. At the time, the user interface had an "Exceptionally Global Utilitarian" look. Although it was "compact" and "complete", it lacked the organization that was needed for our final product.

This, the Second Edition of the BusinessFirst version of the software has replaced that old "Flash Gordon" look with a new and friendly "Come on in!... 90's look." with menus that are displayed as related buttons grouped under individually labeled tabs.

The relation is derived from the steps necessary to conduct the survey. The tabs are numbered and labeled in the natural order they need to be performed by the site conducting the BusinessFirst survey. That order is outlined in this manual for the purpose of using this software. But, the established procedure is fully outlined in the parent to this manual, The *KANSAS BusinessFirst* Self-Guided Manual.

But, back to the software. The new menus greatly simplify the software for the Kansas BusinessFirst software user. And I hope this new manual will too.

For the First Edition feedback, I personally extend thanks to the brave souls who persevered that first October "voyage" with this software unleashed on the free world. It is from those first steps and the great feedback, that I was able to assemble this version.

To them, I again say thank you for the great ideas and input. It was used to fuel the completion of this complex and unique product with its equally complex and unique purpose.

I thank Konni Kelly of the KDOC&H and Genna Ott at IPPBR/KCCED for keeping things focused. Finally, I thank Charles Krider, Executive Director of IPPBR for his continuing encouragement and support for this project.

This, the "*KANSAS BusinessFirst*™ 1998 Edition" of the software is "bound" to the "*KANSAS BusinessFirst*™ Business Retention and Expansion Survey". The process of business retention and expansion is not this or any other software product.

This software is a tool that assists with organizing the data collection and information tracking. The methodology and its entire process, including how the software fits into the methodology are described in the *KANSAS BusinessFirst* Self-Guided Manual. (Even as I write this, training courses on managing and performing the whole process are on the way.)

This very special edition of the ÆXSystems software, with the BusinessFirst™ survey connects Kansas businesses with agencies they need or can use. These agencies are matched to firms according to the survey answers provide by the firms. This will automatically give firms an advantage of specialty services provided by both private and public sectors of Kansas.

These connections can improve the economic health of Kansas by utilizing available expertise and resources where they are needed.

Finally, I have been instructed to convey the following message from the KDOC&H, by Konni Kelly. I have taken the liberty of editing for "correctness".

The staff at the Kansas Department of Commerce and Housing would like to thank the Business Retention and Expansion Advisory Group for their assistance with reshaping the survey instrument, time spent evaluating and creating feedback, and acting upon that feedback. These combined efforts brought about this astonishing Second Edition of the software. A list of the Members of the Business Retention and Expansion Advisory Group appears in Appendix A.

Alexander Barket
1998 January

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Special Notice

This user's manual was prepared in part by the Institute for Public Policy and Business Research, the University of Kansas, through a grant from the Kansas Department of Commerce and Housing and a technical assistance grant from the U.S. Department of Commerce, Economic Development Administration, Denver Regional Office.

The statements, findings, and conclusions are those of the author's and do not necessarily reflect the views of the U.S. Department of Commerce, the Kansas Department of Commerce and Housing, and IPPBR, the University of Kansas.

Table of Contents

Introduction

How to Use the *KANSAS BusinessFirst* Software User Manual

The *KANSAS BusinessFirst* Software User Manual is organized under the following sections:

I. **Local Set-up and Management** contains the instructions for initiating and managing survey projects. The agency using the software must be appropriately organized to anticipate project needs and to ensure optimal use of the software for conducting successful surveys. This manual section describes these procedures in a very general form. The *KANSAS BusinessFirst* Self-Guided Manual covers this particular subject with a broader range of related subjects, as well as the software and what role it plays.

II. **Glossary of Terms** lists alphabetically terms utilized within this manual and by the software itself. They appear here to be convenient. Scan them. Become familiar with the terminology used in the frame of reference of performing surveys and how the software facilitates that.

III. **Installation of Software** provides step-by-step instructions for installing the *KANSAS BusinessFirst*™ 1998 Edition of the software.

IV. **Using the Software** begins with instructions for collecting static respondent (firm) information, and proceeds with instructions selection of a survey, creation of Local Issues questions, preparing survey forms, entering survey responses, and preparing reports of the results. Through a mechanism of data-exception management, the software automatically detects potential problems in the business community ("Red Flags") and provides information for seeking assistance from the appropriate state agencies ("Referrals").

V. **Advanced Features of the Program** provides an overview of the advanced toolkit provided with the software.

The *KANSAS BusinessFirst* Self-Guided Manual contains more detailed information on developing a local business retention and expansion program. Specifically, the *KANSAS BusinessFirst* Self-Guided Manual covers:

- Getting Organized
- Registering and Working with KDOC&H,
- Conducting Business Surveys and Visitations,
- Analyzing Survey Results,
- Developing Recommendations and Action Plans, and
- Long-term Follow-up.

It is *highly* recommended that you read the *KANSAS BusinessFirst* Self-Guided Manual, and understand the subject matter covered before embarking upon using this software or delving into this manual.

This manual is primarily a technical document of a computer software program. That program is just one of the tools that facilitates many carefully designed procedures described in the *KANSAS BusinessFirst* Self-Guided Manual.

If you have an understanding of the subjects covered in the *KANSAS BusinessFirst* Self-Guided Manual, then proceed. This should all make sense to you.

Section I: Local Set-up and Management

This section is an overview on setting up and managing a survey using the *KANSAS BusinessFirst* software. It briefly outlines the process of developing survey questions, conducting a survey, entering responses, and analyzing data.

Note: More detailed organizational and management instructions can be found in the *KANSAS BusinessFirst* Self-Guided Manual. This section of the manual is an outline of tasks that require the software for completion. This manual tells you how to make the software work to accomplish the required tasks. The task become "required" in some cases because of decisions made about subject matter that is discussed in greater depth in the *KANSAS BusinessFirst* Self-Guided Manual.

1. **Set up the computer workspace to handle your survey project.** Select ample workspace for the computer activities of this project. Choose furniture and environmental considerations that are ergonomically arranged for hours of computer operation in long demanding stretches. This is the nature of survey processing.

   Doing a thorough job requires long hours. These hours are spent utilizing the software to record and track the individual progress of each firm surveyed at every step along the way.

   The *BusinessFirst* survey can take 20 to 40 minutes just to complete the data entry for the survey responses. Also, consider that if you add local questions, you add even more data entry.

2. **Select a reliable, fast, computer that you can dedicate to this process.** It is highly recommended that *BusinessFirst* Survey processing be the primary system usage of the selected computer. Adequate time must be available to do the data entry of the survey, and other housekeeping functions. Refer to Section III for specifications of minimum hardware to operate the software.

3. **Install the survey software.** The software need only be installed once at a site and it is critical that it is installed to include the correct site-identification information. Detailed instructions for installation are listed in Section III.

4. **Collect the respondent (firm) information and enter it into the system.**
   Collecting Respondent Information. Creating a firm list to enter to the respondent database is the first step. The source data for this will presumably be in place already, but if not, creation of a new list can be achieved from business directories, local government agencies, or even the yellow pages. See the *KANSAS BusinessFirst* Self-Guided Manual for more information about developing a list of firms for the respondent database.

   Entering the respondent information into the system. Once the information has been collected, it needs to be entered into the system before the survey is conducted. Individual data entry forms allow one-by-one data entry of the firm information, or entry of the respondent static information can be performed in "bulk" from spreadsheet(s) using the import capabilities of the software.

5. **Define the survey that will be conducted at your site.**
   After the respondent information has been collected, or while it is being collected, the local site will need to decide on a "survey strategy". That is, whether to select one of the preinstalled "ready-to-use-plain-vanilla" surveys, or customize the survey by disabling some of the questions and/or appending "Local Issues" questions.

6. **Prepare firm "paperwork" for each respondent of the survey.**
   The software handles more than one survey at a time. A site may need to conduct multiple working surveys concurrently or in some sequence. A site can selectively conduct each survey on all or a "subset" of the firms in the Respondent database. To keep the whole mess straight, an internal "paperwork" document, the Work Card is used.

   Work Cards identify which respondents will be part of which survey. A single respondent will have a separate Work Card for every survey the firm participates in. Other paperwork created (if needed) is the Cover Sheet. The Cover sheet (unlike the work cards) is the same data for all surveys. It is a history/schedule of the contact with the firm.

7. **Prepare to conduct the survey.**
   Before beginning the survey interviews, a plan needs to be developed for distributing (how and who will interview whom), receiving, conducting, and collecting the surveys. See the *KANSAS BusinessFirst* Self-Guided Manual for more information being properly prepared for the interviews.

   Being prepared is being familiar with this software and before that, with the *KANSAS BusinessFirst* Self-Guided Manual.

8. **Enter the survey responses.**
After the survey responses have been received, the software can be used to record those responses. This phase is important, and most tedious.

Please read the discussion about "compacting the database" after about every hour of data entry. The behavior of the Microsoft® Access® runtime and Microsoft Jet Database Engine requires this.

The database will begin to become "bloated". The software will run sluggishly at first. Then the program will begin to fail to display data entry multiple choice options.

Do not worry though. If the program fails to display multiple choice options during data entry, then, exit the program. Run the compaction menu option found in the Window95/NT4.0 "Start" Menu. This process takes only a few moments, perfect for a short break. Doing this periodically (about every hour of data entry time (or after entering responses for 2 or 3 surveys) will avoid problems altogether.

Perhaps at a future date this procedure won't be necessary.

9. **Report the survey results.**
The software allows the user to obtain a report of survey results after completion of the data entry of surveys. The survey results can be presented in several report forms – Data Recap (summary tables), Red Flags, and Referrals. Red Flag and Referral reports help identify problematic situations. After reviewing these reports, the local user may contact relevant agencies or "referral" institutions with correspondence materials prepared by the software.

10. **Follow-up with Firms and KDOC&H.**
Firm Follow-up. The system provides both the local community and the respondents with an immediate means of dealing with compiled survey results. The *KANSAS BusinessFirst* software can prepare a complete set of correspondence materials that the local site can use to contact agencies for assistance with a particular firm. The software also creates correspondence material to the individual firms to let them know what resources are available to them for their specific needs.

Section II: Glossary of Terms

The following terms can be found throughout the software and user manual:

Active Survey refers to the survey question-set currently in use. The active survey is identified by its Survey ID, a twenty (20) character identifier that is unique for each **working survey**.

Active Survey [Utilities] Utilities are special tools and reports that are included with the software. Some utilities are designated "Active Survey Utilities" because they operate solely upon the questions and answers of a specific survey that has been "activated" and is being operated upon. Also see Global Utilities below. Active survey utilities appear on various tabs of the software's main control panel. The buttons representing the Active Survey Utilities appear once the operator has selected the active survey.

Buttons icons on the form that resemble pushbuttons. Buttons have text on them that describe the activity or function to be performed when they are "pressed". To press a button, simply put the mouse cursor over the button and press the left mouse button. The "Button" on the **Form** will appear as "pressed" while the mouse button is held down (or space bar on the keyboard for buttons that are currently "selected". After clicking on a button, the underlying activity or function will then commence.

Cover Sheet the top sheet of a survey that contains static information (name, address, etc) and other information specific to the respondent completing the survey. Only one cover sheet exists for a **respondent** (firm). Specifically, the coversheet created for the "first" survey of a firm will be the same for all subsequent surveys of a **respondent**. Work Cards, (see below) however, are generated for each respondent, for each survey. The Cover Sheet information is recorded and maintained on a **Work Card** tab.

Data Recap a report in table format prepared by the software that lists frequencies and percentages for all the responses entered for each individual survey question.

Dialogue-Box A part of a form that contains instructions about the current state of the program. Dialogue boxes are usually requests for additional information; or to inform the user of some condition that exists with the program.

Exception events that are sensed from the answers provided by a **Respondent** that the **Site** and KDOC&H desire to track. Reports provide lists of all tracked exceptions, and lists of respondents that "trigger" the exception. There are two types of exceptions **Red Flags** and/or **Referrals.** "Exception" events can be defined for tracking by the site.

Exception Notification Agency Every **exception** has an **Exception Notification Agency** associated with it. A notification agency has no limit on the exceptions it tracks, but no exception can exist without an agency.

Fields areas on the form that may require text entry or text selection, or which may display "default" information that cannot be edited.

Form(s) Dialogue boxes displayed on the video monitor that contain **Fields** and **Buttons** containing information about a specific item such as a **survey**, a **respondent,** or other specific data.

Global Question Pool Consider that all of the questions in the Survey Database are in a "Pool". From that pool we identify a question by its QuestionID. The **Question Operations List** contains a series of QuestionID's sorted by an independent field containing a **sequence number**. That independent sequence number determines what order questions are presented.

Global Utilities Utilities are special tools and reports that are included with the software. Some utilities are designated "Global" by virtue of the fact that they operate on non survey items. So called "Active Survey Utilities" operate solely upon the functions and reports surrounding the questions and answers of a specific survey. For example, Respondent static data is global, as are the cover sheets and question exception rules. Access to the Global utilities can be achieved through various tabs on the software's main control panel.

Inclusion Sets When exporting data from the resultant answers of a survey, a "subset" of the information can be specified using a "named" inclusion set. Several "canned" inclusion sets are provided with the software. The "test" inclusion set allows any desired selection to be changed. Other inclusion sets are locked from modifications.

Log [work card] log of activity when the survey was data-entered. The log is part of the ÆXSystems™ software and is included with the Kansas BusinessFirst edition as such.

Menu Bar Most ALL Windows95 and Windows style programs have a Menu Bar. The items on the Menu Bar almost always contain the Program Control Box Menu (an Icon representing the running Program, followed by the words: "File Edit Insert Records Window Help".

Notification Agency See **Exception Notification Agency**.

Operations List see **Question Operations List**

Parent Survey

The *Kansas BusinessFirst*™ Edition of the software has two surveys which are templates for the **working surveys**. All **working surveys** are cloned from one of two parent surveys in the system. They are named "Parent Long" and "Parent Short". The original text of the parent surveys is "locked" from alteration. A site is supplied with five working surveys, all of which were cloned from one of the two parent surveys. Two of these surveys, "1998 Long Survey" and "1998 Short Survey", are intended to be used as "production" surveys. The other three, "ALongPractice", "AShortPractice" and "SampleNoPlantNExport" are for practicing on the system. The last one (SampleNoPlant) is a sample of a "custom" survey with questions removed from printing and data-entry via modifications to the **Question Operations List**.

Printed Number

When a blank survey is printed, the items are presented in the order of the **"Sequence Number"** from an entry in the "**Question Operations List"**. However, the program prints the **"Printed Number" property** of a question rather than the sequence number or the QuestionID. Thus, a list could print the question numbers as a series: 1, 1a 1b 1c 2 2.1 2.2 ,,,etc,; or a sequence of letters: "a,b,c,...etc". A printed number property that is blank will cause the question to be listed as part of the last question item with a non-blank Printed Number property.

Profiles

An entry that describes the Survey for reporting. Every survey has a profile entry that contains the SurveyID, the description and the "bio" (purpose statement) of the survey

Properties

Various items within the system have attributes that describe and control the item. The Survey Profiles have an attribute (property) that makes it either Active or not. The **Question Operations List** has properties that allow the question to be turned off or on. The **Questions** have properties that include the Question ID, the Printed Number, the sequence number, and a flag indicating whether the question is "Active" or not. In all cases, these properties control and communicate to the program how the "item" is to be handled in various contexts.

QuestionID Each question in the **Global Question Pool** is identified by it's own, unique Question Identification Code, the QuestionID. A question has many **properties** that control its printing and data entry behavior. Some of these properties are changeable by the **User**, and some are locked.

Question Operations List The collection of questions from the **Global Question Pool** that make up a survey. These have a number of properties that allow the software to manage the survey. Each entry has the QuestionID, the sequence number (determines order of presentation) and the "Printed Number" (the question number shown on a printed document.) Two check box options that control whether to present the item for printed or data-entered processing allows a survey to be custom tailored.

Question Pool See **Global Question Pool**

Record Selector A term used in the Microsoft® Access system that refers to a special control on a form where records are being maintained. Almost all of the **Forms** in the system maintain recorded data (information stored in the database itself). The record selector is located to the left of recorded field items. The current selected record reflects a pointer symbol (▶) which resides at the top of the "frame".

The form's record selector can select one or more in a sequence. However, all records in the "start" to "end" of the select are "selected", and , no records in the middle can be "unselected".

Clicking on the Record Selector is the same as using the Menu Bar "Edit " (menu), then clicking on **Select Record.**

Red Flags A type of **exception** that can be tracked and from which a report of potential problems for a respondent or respondents; detected automatically by the software depending on the firm's responses. A respondent's Red Flags are posted when data entry completes and when any exception report is called for.

Referrals A type of **exception** that can be tracked and from which a report containing the names of agencies. These agencies provide assistance for specific types of problems or concerns. A respondents responses to the survey are processed and exception are detected automatically by the software depending on the firm's responses

Reports summaries of the survey results prepared by the software, includes **Data Recap**, **Red Flags**, and **Referrals.** Also, compendium of questions and their properties; survey question references; and blank survey reports are included.

Respondent(s) firm(s) responding to any of the working survey(s).Respondents have two id's. The RCID is a record counter ID that is automatically assigned by the software. However, the user can assign any Unique Code to the RespondentID field in the Respondent maintenance form(s) ("Maintain Respondents", and "Maintain Current Respondent".)

Response Density report illustrating how many responses from the various respondents have been entered into the software program. Use this to determine if analysis is viable. Specifically, if only a few surveys have been returned and data-entered, certain kinds of analysis will be inconclusive.

Sequence Numbers questions found in a survey's **Question Operations List,** are ordered by the sequence number. So, Blank Surveys display questions in the sequence determined by this number. Likewise, data-entry is processed in the same order. The "**Printed Number**" is what appears on the Paper survey.

Site local organization that operates the software and undertakes the survey process.

Static [information] background information about a respondent (firm) such as address, phone number, contact person, SIC code, …

Survey a set of questions to be asked of the respondents; only one survey and its database of respondents may be **Active** (in use) at any time, although many working surveys may exist in the database. Also, see **Parent Survey** and **Working Survey.**

Tabs The Main control panel and some subordinate control panels use "tabs" to subdivide the functionality of the program. The appear like "Buttons", but function like the buttons on a radio. Only one tab can be active (pressed/clicked on) at once. Each tab displays buttons or information that is appropriate to the task being performed and the "description" on the "tab" itself.

Ticket part of the Work Card (see below) that contains information about the specific survey. The ticket "Tab" on the work card shows when the survey was "conducted" (data entered in this context). The ticket is part of the standard software, but its utility in the *Kansas BusinessFirst*™ edition is not considered "high". It is retained in this edition for whatever utility the site deems to make of it.

User you, the person using the survey software.

Utilities software tools and reports that facilitate the processing of survey information, maintenance of questions, respondent static data, and so forth. Two distinct utility groups exist within the software: "Global Utilities" and "Active Survey Utilities and Reports". The commonly used utilities are located on at least one of the tabs of the main control panel. "Active Survey Utilities…" appear only when the program operator has set the active survey.

Work Card contains the history of activity and other contact with a respondent for a particular survey. A respondent (firm) will have a Work Card for each active survey in which they participate. The work card contains tabs that permit maintenance of the Cover Sheet (see above), and display calculated exceptions divided into two tabs labeled "Red Flag Items" and "Referral Items."

Working Survey a survey that can be activated (made **Active**) as opposed to a **Parent Survey** from which working surveys are cloned. Selecting a working survey in either the "Maintain Survey Profiles" or "Select the Active Survey" forms will cause the survey to become "**Active**".

Section III: Installation of Software

Please note the minimum requirements again. If these are not provided on the target PC, the software will operate with poor performance or, perhaps, not at all.

Minimum requirements:

Intel Pentium 133mhz or higher *highly* recommended
(An Intel 486 66mhz This processor will work, but will perform *very* slowly.)

PC running Windows 95 or Windows NT 4.0

16MB of RAM. (32MB of RAM for Windows NT. 4.0)

400 MB of free disc space. 600MB would be better.

CD-ROM Reader

Floppy disc drive (for data export to KDOC&H).

Video modes 1024 by 768 (XGA) recommended, but, 800 by 600 SVGA will work if operating with "small fonts" as set in the "settings" tab of the screen and monitor properties. If "large fonts" is selected, then 1024 by 768(XGA) resolution is recommended to display forms correctly.

1. The software is installed by placing the CD-ROM disc in your CD-ROM drive.

2. Launch the Window's explorer (found by clicking on the Windows95 "Start" button [usually] at the *lower left* corner of the computer's screen under Programs) or, open the "My Computer" Icon on the desktop. Under the "Programs" menu find the Windows Explorer. Do not confuse the Microsoft Internet Explorer for the Window's Explorer.

3. After starting the explorer, locate the CD-ROM drive letter. Double click on the CD-ROM Drive letter indicated for the computer.

4. Locate the directory named "Setup" on the CD-ROM. The "Setup" directory is located at the Root level of the CD-ROM. Open the directory by double clicking on the folder icon.

5. Locate and double-click the file named "Setup.exe".

6. The program will attempt to install in the directory named "C:\Program Files\Kansas BusinessFirst Survey Software". It is *highly* recommended that this be done, although, a different drive, or directory may be chosen. Using the recommended directory will insure one less potential problem in the future.

7. When the setup software requests the type of installation, select "Typical". (Using a custom setup, and de-selecting program installation options might render the system inoperable, or incomplete.)

8. It will take a few moments to copy files. It may require a restart of Windows before full installation is complete. Let this process take place or perform it before running the software.

9. Once the software has initially been installed, it can be launched by Clicking the "Start" button on the Window's desktop menu; then select the item "Programs"; then select "Kansas BusinessFirst Menu"; then "Kansas BusinessFirst Survey System". The first time the software is launched, installation will be complete.

10. On the first launch, the program will perform some first-time initialization. This takes a few seconds. A login dialogue box that requests your name will appear. Enter your name as you will enter it each time you run the software.

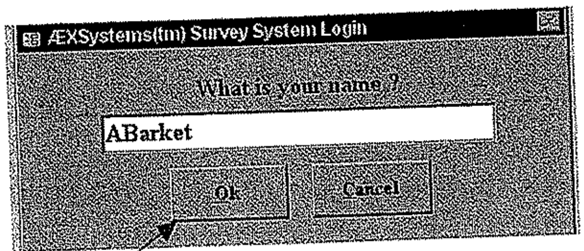


Figure: Login Dialogue Box.

After the **OK** button is clicked (or you type the "Enter" key, Site initialization must take place.

11. The ÆXSystems™ Software License agreement will appear next. This same text appears on the title page of this manual. To install the software, you must "Accept" the license. (It basically says that you agree to use the KDOC&H BusinessFirst™ edition only for its intended purpose.)

12. The site id is constructed of parts of the Site Name, the Site City, the Site County and the Site State code. The KDOC&H region is automatically assigned from the Site County field. The User in most cases only needs to enter the Site Name and the Site City field.

    About 600 city names are loaded into the system. If the County isn't automatically selected, then please do so by manually typing the name in.

    Note: The names of cities beginning in St. (Saint) or Ft. (Fort) should spell the word "Saint" and the word "Fort" out.

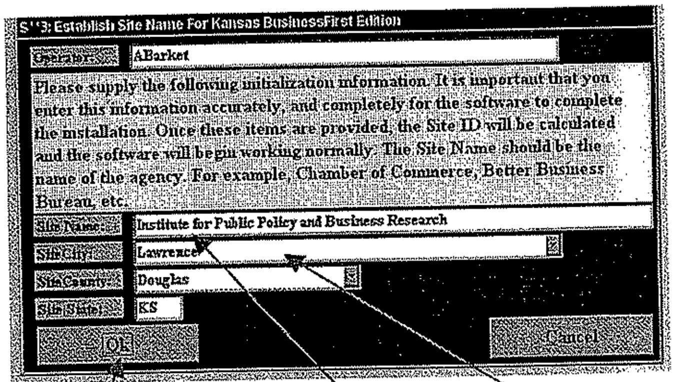


Figure: Site Initialization dialogue box.

The first time you run the *BusinessFirst*™ Edition of the software, local "Site" information must be provided. Enter the name of the site and the city. If your city doesn't automatically select a Kansas county, please select the county for the software.

Only counties of the State of Kansas are selectable. Only the state of Kansas is allowed. When you have determined all information to be correct, click the **OK** button.

13 A form will appear with the "Billboard" . When two cycles of the messages have finished the billboard will automatically close. If you desire, click the blue Close button to stop the Billboard. Your name will be "registered" as a Bill "Bored" operator, and you won't see the billboard again, unless you click the "About" button on the main control panel.

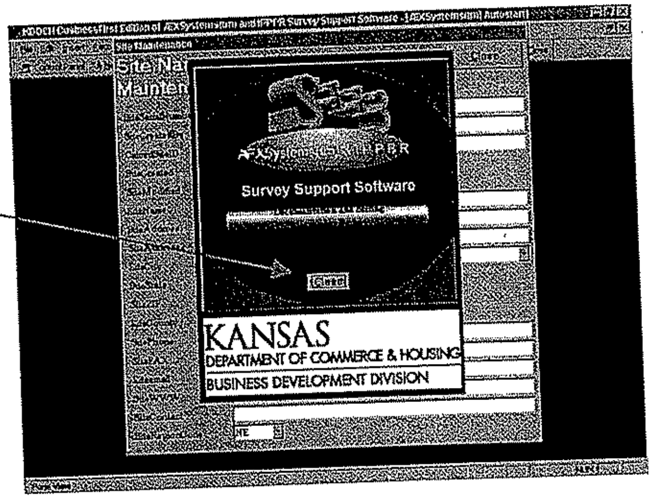


Figure: Billboard after First Launch.

14 The "Site Name and Address Maintenance" Dialogue Box will appear. At this time, complete entering all site information *below* the "Site Modified Field" that has not been completed on the form. Fields are used in various reports, so it is important that this be complete and accurate.

Notice that the KDOC&H region code was established by examining the "County".

After the first execution of the program, it is recommended that you exit one time, then restart the program for normal operation.

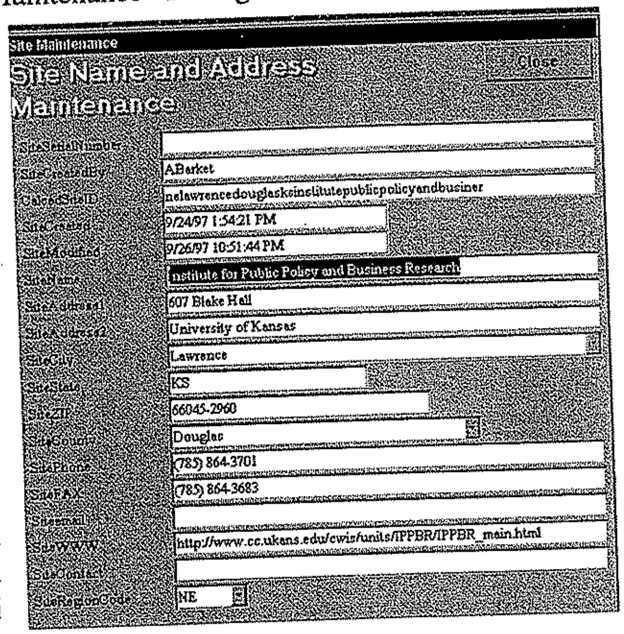


Figure: Site Maintenance Dialogue Box.

15 The software program is now ready for "production" usage.

Section IV: Using the Software

This section provides instructions for using the software to create and manage the surveys, respondent (firm) information, and the survey results. *Using the Software* covers the following areas:

Introduction:	Starting Out describes how to login to the system after launching the software. Instructions for launching the installed software are on the next page.
Phase I	Entering firms into the Respondent database. This phase will take some time to complete if you have a lot of firms to enter.
Phase II	Selecting an existing survey, or creating a "custom" one with "*Local Issues*" questions attached, or some questions "disabled".
Phase III	Creating necessary respondent "paperwork" to conduct the survey.
Phase IV	Entering response data. This is where you will spend most of the time in the software.
Phase V	Reporting Survey Results. This phase can be performed as often as deemed necessary.
Phase VI	Generating Correspondence. This should be done ONCE per respondent per survey.
Phase VII	System Maintenance. This is periodic stuff to do, including backup and transmittal of data to the Kansas Department of Commerce and Housing.

This section also describes some basic procedures and information necessary for the user to maintain the system, such as offering tips on storing and deleting information.

The phases of software use are designed so that the user may accomplish entire tasks without distraction. It is recommended, but not required, that the following tasks be conducted and completed individually rather than sequentially over and over through the steps:

- enter the respondent information
- creation of the survey form
- prepare the surveys for distribution
- enter survey data
- generate reports
- generate correspondence

Data entry of the survey results can take place all at once or as the surveys are returned. The software allows for easy and immediate data entry for single or multiple survey responses.

Ok! Ok! Ok! You say. I hear the plea of enthusiasm. You are asking "SO, how do I run the software ?"

Launch the installed Kansas BusinessFirst software by clicking on the "Start" button of your Window's 95 or Windows NT Desktop.

Click on "Programs"

Click on "Kansas BusinessFirst Menu"

Click on "Run BusinessFirst Survey System"

Introduction

Starting Out

1. **Enter login name.** The system will ask the user to enter his or her name as shown in the figure below. When the user exits the main control panel, another may press the "**Next Run Step**" button on the toolbar to login a new user.

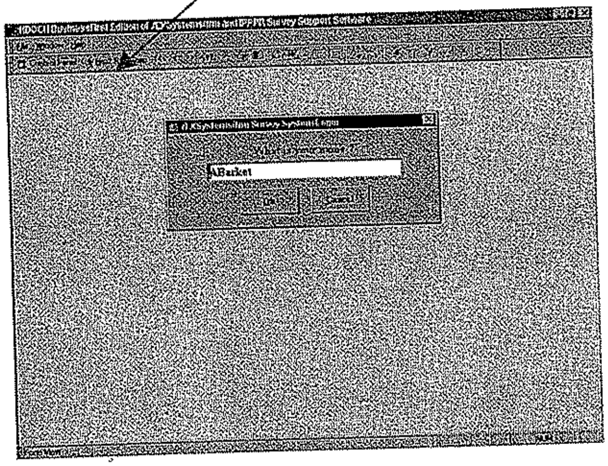


Figure: Login Form

After accepting the name, the software will display a "billboard" the first time a name is entered. The billboard figure is shown below.

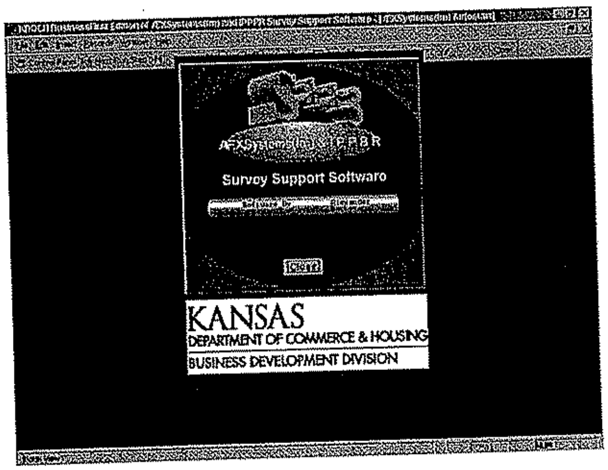


Figure: Billboard Form

The billboard will appear once for each unique user name. So subsequent logins will not produce the billboard form. To ignore reading the scrolling information (billboard), click on the "Close" button to proceed.

The **menu bar** contains File, Edit, Insert, Records, Window, and Help options, which do not apply to the opening form displaying the Main Control Panel (except for the program Exit option in the File menu).

Toolbar Notes:
The toolbar at the top of the form allows for finding, filtering and sorting information.

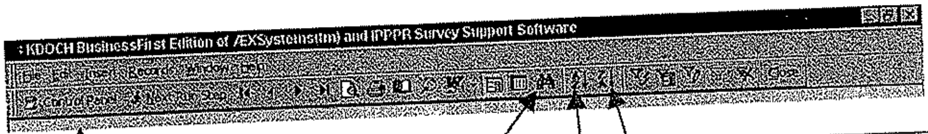


Figure: Toolbar.

To perform a search, select the field containing the item you want to search (or sort). Then, select the "binocular" icon from the Toolbar at the top of the form to perform a "Find" operation. The "Find" dialogue box appears. Enter the name of the firm and select the search options desired.

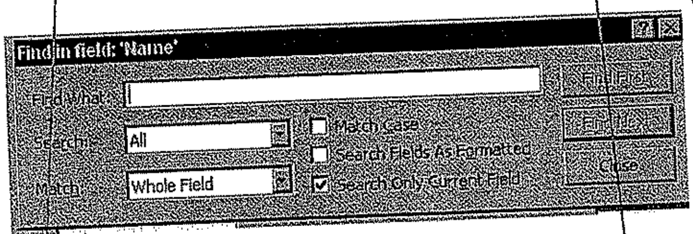


Figure: Find "Dialog box"

To perform a sort, select the field on the Respondent form and press one of the Toolbar buttons to sort. Two options: "Ascending" or Descending" are available.

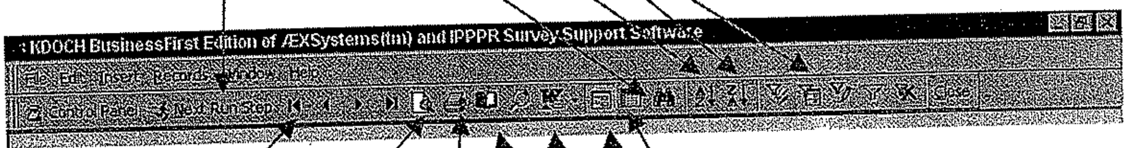
The "Toolbar" , located at the top of the form contains several buttons that operate throughout the system in a "contextual" manner. The Control Panel button will usually return to the control Panel. If it does not, then some operation must be completed first.

More about the ToolBar…

The "Next Run Step" button on the toolbar is the "quick and easy" way to begin data entry on a survey. Each time it is clicked, the next step toward data entry takes place. First, select a survey, Next, select a respondent, Next Data entry. If "login" is required, it will automatically launch that first. For performing data entry (after all administrative functions are in place), this is the fastest and easiest route.

Finding specific records can be performed in some forms using the "binoculars" tool.

Sorting in either Ascending or Descending order can cause forms to sequence through records according to a specific field select for sort. Finally, filtering can be achieved to unselect certain records using extended selection criteria under the four special filter buttons.



VCR Navigation buttons allow for record navigation in many of the forms and forms.

Print preview and print buttons operate for many of the forms and reports. Also, a button for page setup works for certain contexts of the program.

Export to Word and Excel works for some forms. Respondent entries, for example can be exported to Excel or Word.

Some forms allow switching between a Form View and a Data Sheet view.

The Main Control Panel: More Discussion.
The Main Control Panel serves as the gateway to the operations of building and maintaining a database of respondents, designing the survey that will be conducted, creating paper work, performing data-entry and finally, preparing survey summaries and reports.

The Main Control Panel can be accessed from most forms, and/or it may be found minimized at the bottom of the program display.

The "Main Control Panel" has seven tabs. The first, (displayed below) is the LOGO tab. The others six are labeled from 1 to 6, with a short title describing the button groups to be found. Some of the tabs contain buttons that are also on other tabs. The "Select Survey" button is one in particular that must be executed at least once to activate a survey.

Aside from the "Exit" button, which exits the program, the Main Control Panel contains seven tabs leading to various logical operations:
The first tab is labeled "Logo". It displays advertisements and billboards about the software. The other tabs can be seen in the figure below.

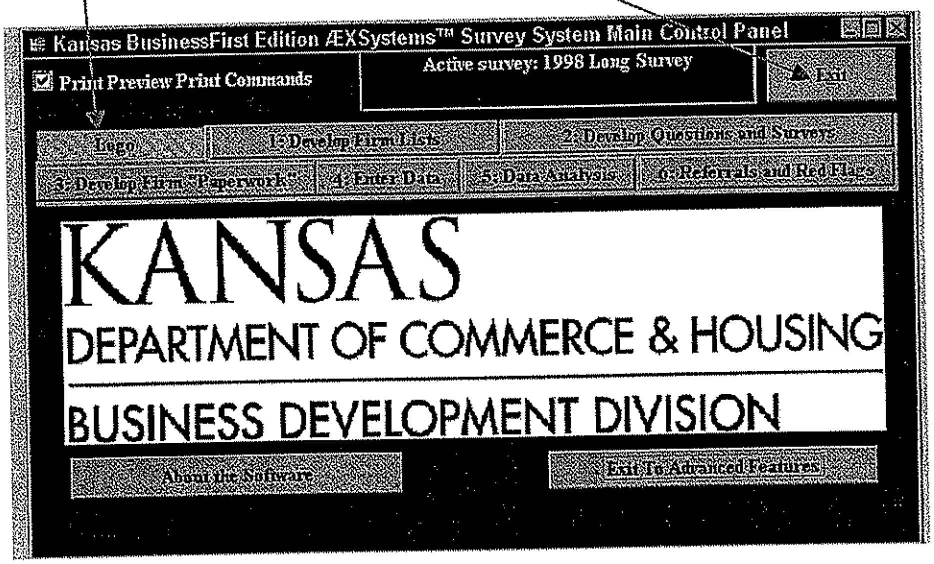


Figure: Logo tab of Main Control Panel

The **Main Control Panel** appears after successful logon to the program.

Get familiar with the program . It is important that the user becomes comfortable with the program. There are several software components to be familiar with before beginning any survey work. Feel free to play around, exploring all the option buttons and reviewing their descriptions; the program will not "break."

An exercise: You will perform this procedure (selecting the active survey) every time you use this software.

Find and view the working surveys . From the Main Control Panel, click on the tab labeled "3: Develop Firm Paperwork". Then, click on the "Select The Survey you wish to create "paperwork" for. (the Active Survey)" button of .

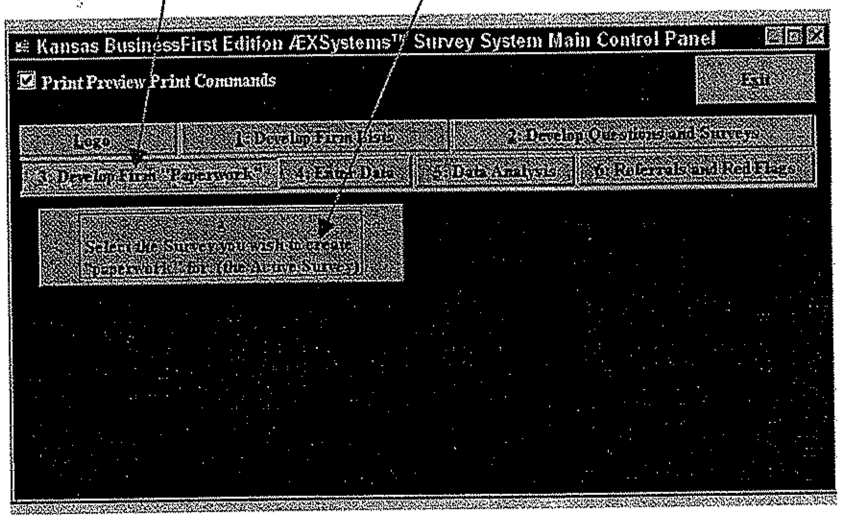


Figure: Main Control Panel Tab 3: Develop Firm "Paperwork"

The "Set the Active Survey" form will appear (see Figure below) ; if the user has not created any surveys, five will appear in the list: **1998 Long Survey, 1998 Short Survey, ALongPractice, AShortPractice and, SampleNoPlant**. The first two ("1998 Long Survey" and "1998 Short Survey") are for production use. The other three are for practicing with the system. The last survey (**SampleNoPlant**) is an example of a survey with questions turned off using the Question Operations Maintenance form.

Note: Some graphic illustrations contain the year "1997".This is because some of the images of the second edition are the same as the first edition, and were not replaced. The figures are to illustrate to the user how the program behaves and appears while running. Underlying information in the survey database is the same for 1997 and 1998 editions of the BusinessFirst survey.

To activate a survey , select the desired survey by clicking on one of the buttons with the mouse or by using the arrow buttons. Double Clicking on the survey will cause the program to continue to the "Next Run Step" (as shown on the Toolbar, or the "Next (Select a Respondent)" shown on the form above. To simply set the active survey, a single click and Close should be performed.

Notice the "VCR Style" buttons for going to the First, Previous, Next and Last items in the list. These buttons appear on a number of the forms of the software and operate in the context of the form.

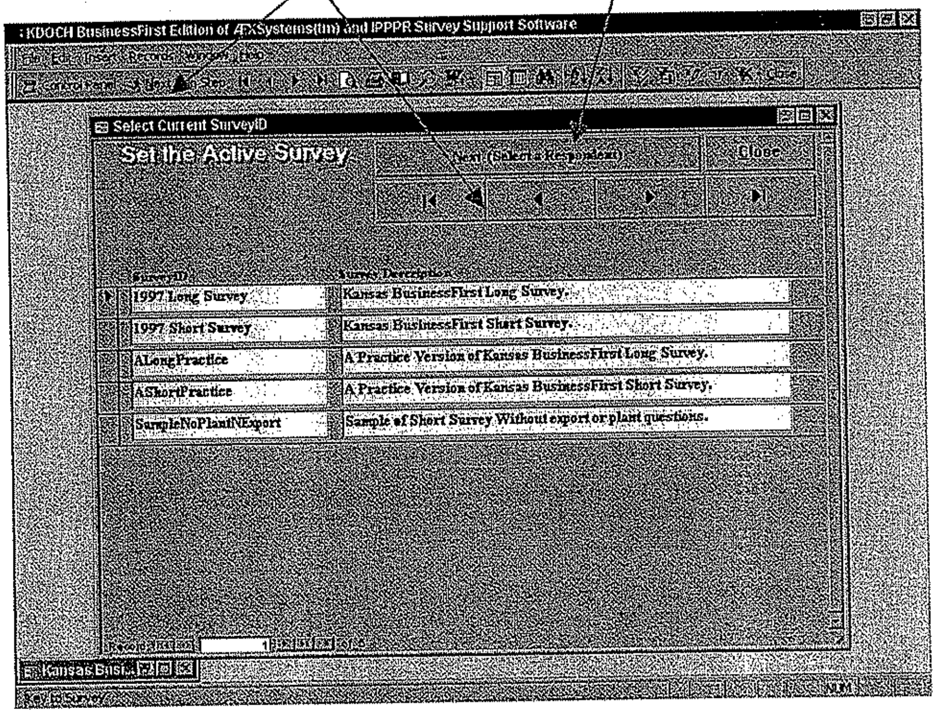


Figure: Set the Active Survey.

Note: The "Set the Active Survey" form can be launched from tabs 4,5, and 6 of the Main Control Panel. The functions and reports on all of these tabs depend upon having an active survey. Until the active survey is set, these tabs will appear with one button that leads to the "Set the Active Survey" form. The active survey can also be set in tab 2 of the Main Control Panel. This tab allow the creation of Local (site specific) questions; and from this tab, the user creates and maintains survey profile information.

Click on the "Close" button. The user has now activated a survey and will return to the Main Control Panel. *Notice* that other option buttons are now available on the Main Control Panel tab since a survey has been activated.

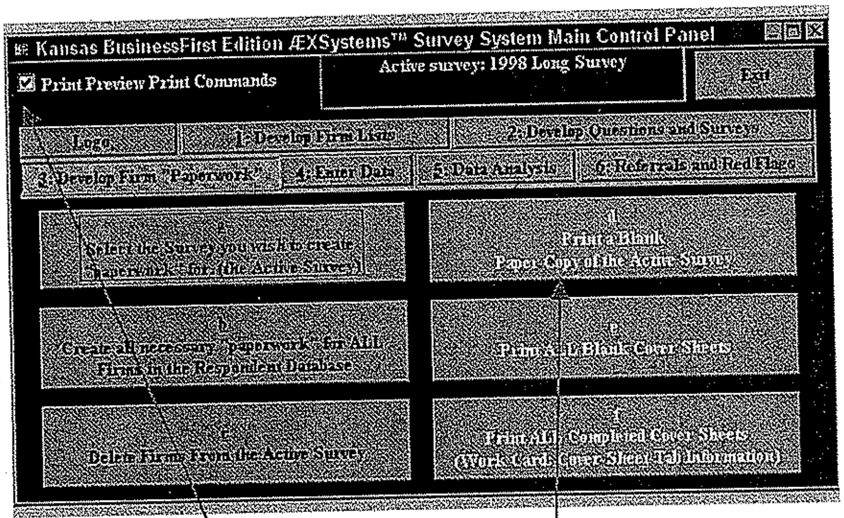


Figure: Control Panel With Active Survey Displayed

Clicking on the "Print Preview Print Commands" option will provide the user with the opportunity to view the parent survey selected and any other printable information on the form before you print.

To preview a survey, click on the "Print Blank Paper Copy of the Active Survey" button. The selected survey is now displayed on the form. See the figure on the next page.

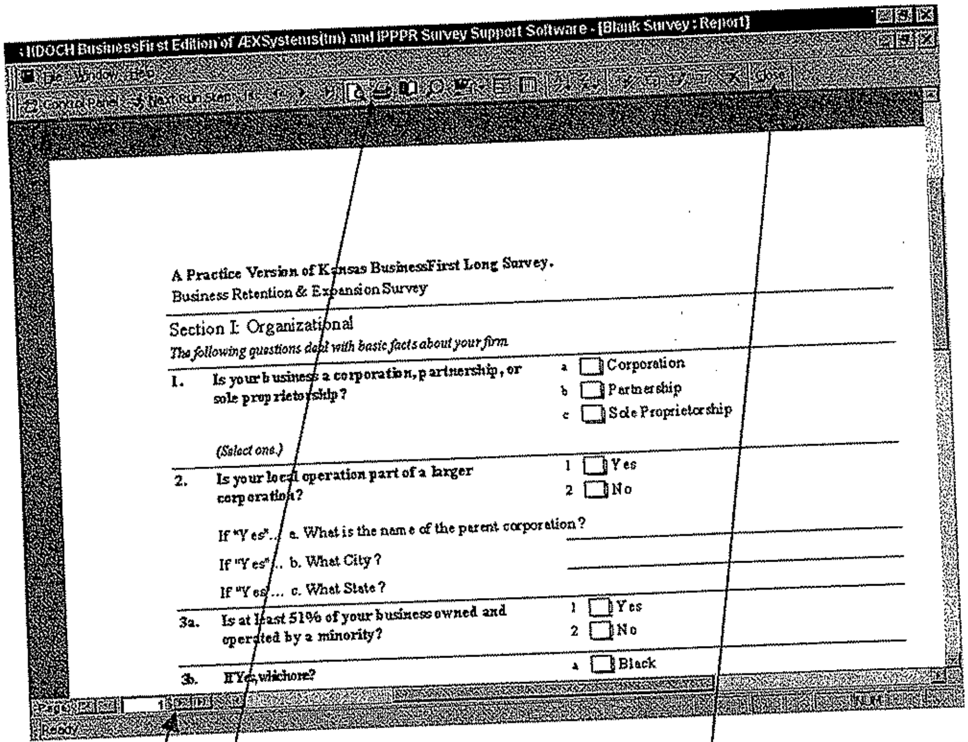


Figure: Print Preview of AlongPracticeSurvey form.

The arrow buttons at the bottom of the form allow for movement between the different pages.

The **1998 Long Survey** (and the **ALongPractice**) survey will display all questions that have been preprogrammed by the survey software. The **1998 Short Survey** (and the **AShortPractice**) survey is a subset of questions found in the Parent Long Survey. Both surveys were developed with input from the Business Retention and Expansion Community Advisory Group.

If it is not desired to print the survey, press the "Close" button on the toolbar.

If the user wishes to print the survey during "preview", then click on the printer icon located on the toolbar at the top of the screen.

End of Exercise

Phase I

Organizing Respondent Information for Any Survey Project

Discussion: Using the "Develop Firm Lists Tab of the Main control Panel

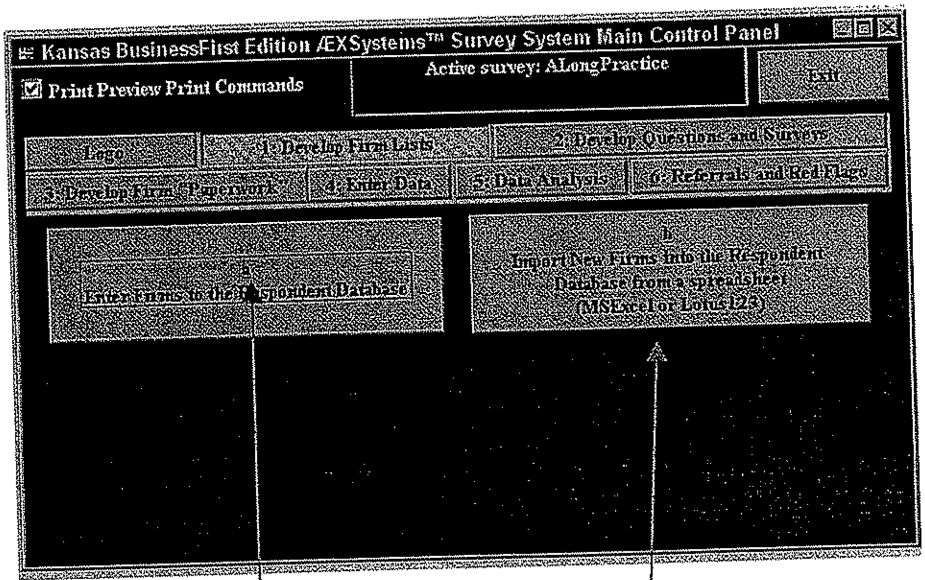


Figure: Main Control Panel Tab 1: Develop Firm Lists

The "Enter Firms to the Respondent Database" button will launch the **Maintain Respondents** form. This form provides access to the total pool of respondents contained in the database. In this way, various contacts, which serve as potential survey respondents, may be entered into the system before a survey is ever prepared for them. This form provides options for maintaining survey Work Cards if the current active survey has been set (from the button, "Set the Current Active Survey and Perform Data Entry" located on the Main Control Panel and is discussed shortly).

The "Import New Firms into the Respondent Database from a Spreadsheet (MS Excel or Lotus 123)" button allows the user to select an import file in Excel or Lotus format. The spreadsheet should contain the names of fields found on the next page. The RespondentID must exist, and must be unique. Other fields should be as complete as possible.

There are three sample spreadsheets on the CD-ROM in the Excel directory. They can be used as "templates" for how data is to be presented when imported from a spreadsheet. The user may copy these and examine them or use the "Empt" versions (which contain no data, but appropriate column headings for the Import Function to work) of these.

A slightly "populated" one exists with some examples of how data should look and where it would go.

The possible names are shown in the left column below. These names must NOT contain spaces. That is, they should be entered on the spreadsheet columns just as shown below.

RespondentID	A code that the Site assigns to uniquely identify a respondent. 20 characters
Name	(of the Respondent) (Firm), maximum 50 characters
Address1	within the same city, maximum 50 characters
Address2	for extra address space (Suite number, P.O.Box number, etc, maximum 50 characters
City	City of the Respondent
State	State of the respondent
ZIP	20 characters (so collect extension -1234 if possible)
County	
EMail	
WWW	(World Wide Web) URL address of home page on the WWW.
Phone	
Fax	
PhoneOther	
FirmSIC	Firm Standard Industrial Code (SIC – 4 digit)
ContactSalutation	Examples: Mr., Ms., Dr. (advise for Ms. rather than Mrs. or Miss)
ContactTitle	Examples: President, Reseach Director
ContactFirstName	
ContactMiddleName	
ContactLastName	
ContactSuffix	Examples:PhD., Jr.

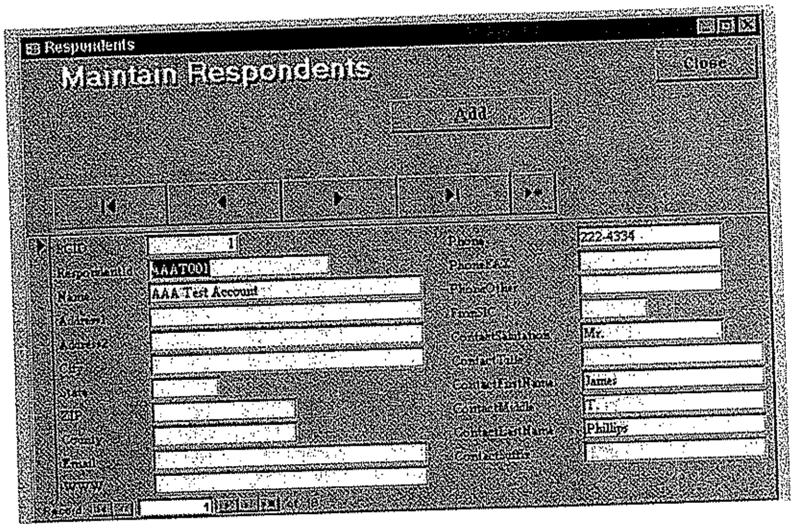


Figure: Maintain Respondents form.

If the current active survey has not been set, then the user may only add respondents to the database of all respondents or edit existing respondent biographical information, not attaching the respondents directly to any survey. (This can be done at any time in the future.)

The large arrow buttons near the top of the form or the smaller ones at the bottom of the form allow the user to move between respondent files.

The blank fields allow data entry, and the **"Add"** button allows the user to add new respondent information to the pool of respondents and potential respondents in the database.

After the current survey has been set, the following functions are available in addition to those described above:

Notice that the fields are named the same as the import names on the prior page. The field named "RCID" which appears above should not appear in the import spreadsheet as the system assigns this automatically.

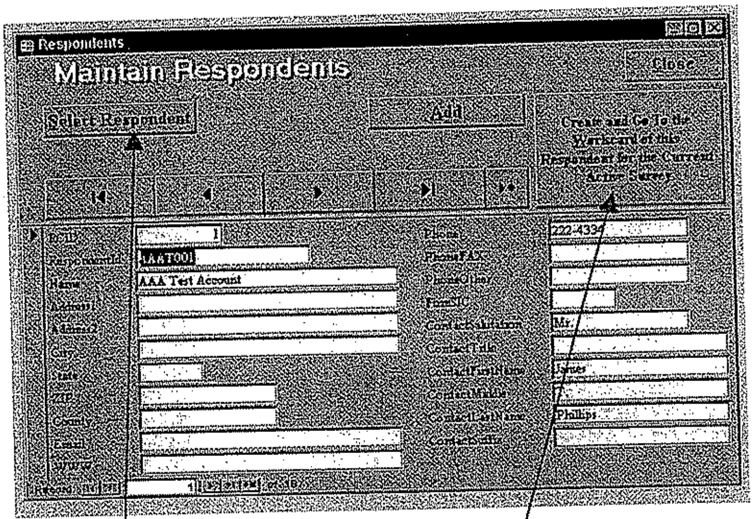


Figure: Active Survey Set View of Maintain Respondents form.

Clicking on the "Create and Go To the Work Card of this Respondent for the Current Active Survey" button leads directly to the Work Card of the respondent displayed on the Maintain Respondents form. Selecting this option attaches the respondent whose information shows on the form to the current active survey. This button provides the opportunity to prepare a Work Card for Respondents as they are added to the current survey.

"Select Respondent" button leads to the Select a Respondent form, providing a complete list of respondents attached to the current active survey. The respondents can be selected and their Work Cards accessed.

Adding and deleting firms to and from the Respondent database.

1. **Enter firm information into the system.** Once it is known what firms will be surveyed and their static background information has been collected, click on the "1: Develop Firm Lists" tab of the Main Control panel. Then click on "Enter Firms to the Respondent Database" button from that Main Control Panel tab.

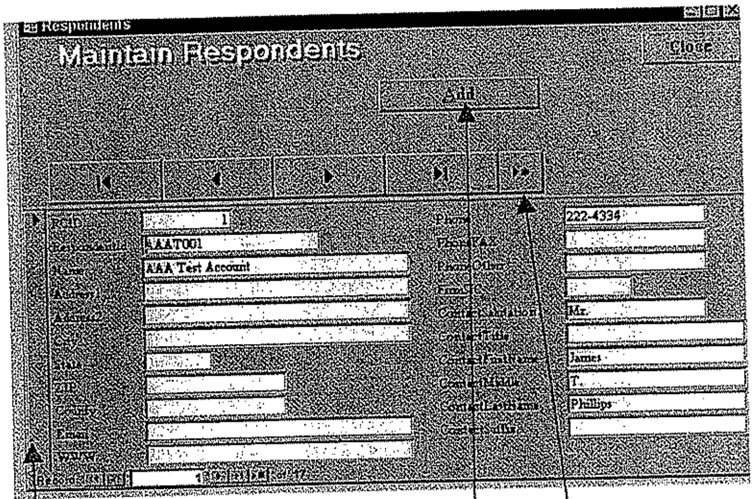


Figure: Maintain Respondents form.

The **Maintain Respondents** form will appear. Use the arrow buttons to move between respondent record entries. The "arrow-asterisk" button operates identically the same as the "Add" button. Both allow for adding a new respondent entry into the database. The program automatically numbers the entry (the RCID field). The user needs to supply any remaining information about the firm. To delete a respondent, click on the "Record Selector", and type the "Delete" key on the Keyboard. Warnings will display, which can be answered to accept or cancel the delete.

Note that if the suffixes require commas to set them apart from the name, the commas should be included with the suffix, such as ", PhD.", with a space between the comma and the suffix. The comma should NOT be included as part of the name.

These respondent (firm) records will remain as a set of respondents within the system, even if they are not used for any survey. A respondent record may be used in one or more of the working surveys.

Phase II

Select an existing survey or create a "custom" one.

Note: This whole phase is optional. You can select either one of two preinstalled surveys to activate for conducting your first survey with this software. These are "1998 Long Survey" and "1998 Short Survey". Or the site can clone one of the Parent surveys and create another survey, with or without all of the parent questions, and/or Site "Local Issues" questions.

1. **Create site-specific questions (optional).** Site-specific (Local Issues) questions may be appended to either of the two parent surveys as a means of customizing the survey to address specific issues in the community.

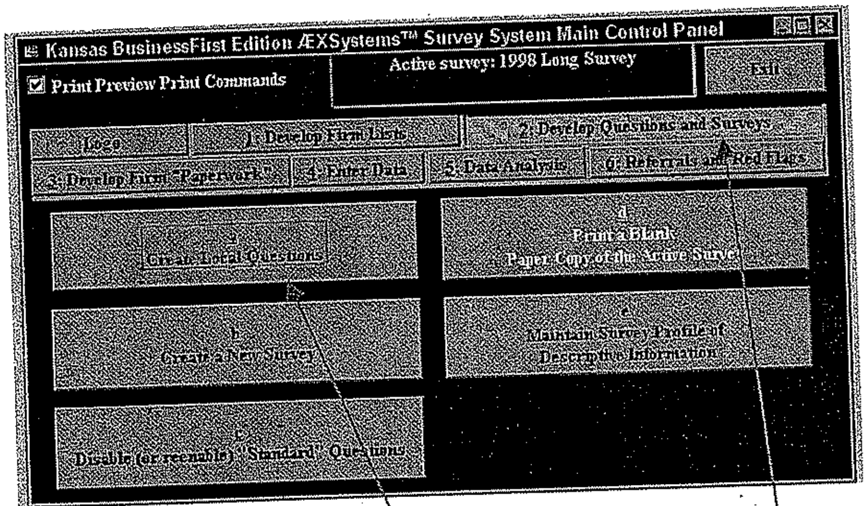


Figure: Main Control Panel Tab 2: Develop Questions and Surveys.

To create site-specific questions, click on the "2: Develop Questions and Surveys" tab of the Main Control Panel. The tab option buttons will appear (figure above). Click on the "Create Local Questions" button. This will launch the **Site-Specific Question Maintenance** form, which provides access to the complete pool of site specific questions contained in the system, whether or not they are attached to any survey.

The questions are appended to a survey that is being created (explained a little later.)

Notice the "Record Selector" apparent on this form. Many other forms also have Record Selectors. They are always to the Left of an entry.

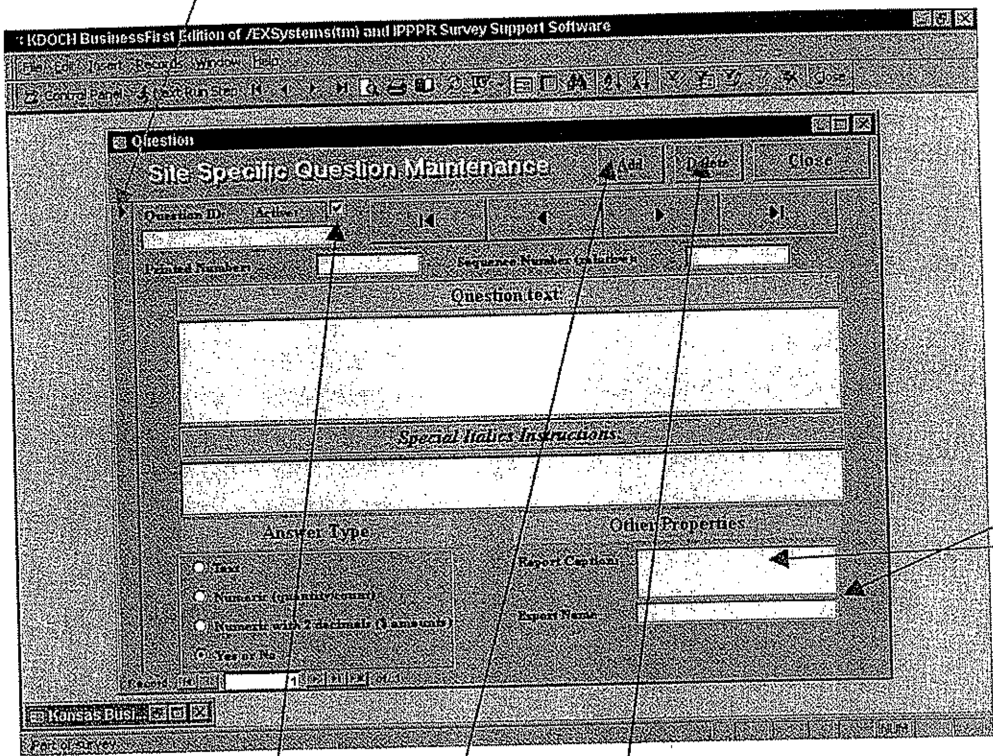


Figure: Site Specific Question Maintenance form

The user will be asked to create an ID number for each new question created. By hitting "Enter" four times, the ID number and the printed and sequence numbers of the question will be assigned automatically. The user then creates questions by typing the text and question instructions, selecting the answer type, and typing the caption that will head the question.

Completed questions may be added to the pool of site-specific (local) questions by clicking the "Add" button; existing questions may be deleted from the question pool by selecting the "Delete" button. (It is recommended that site-specific questions not be deleted because answers provided to these questions will be lost when the question is deleted. Future reference to customized surveys can bypass using a site-specific question by clicking the "Active" check box to reflect "unchecked". Or, by changing the relative sequence number and the Printed Number, the question can appear in a different position in the survey. The QuestionID is the actual "key" to the answer. If you change that key, all answers will have their corresponding QuestionID key changed likewise.

When these questions are attached to a survey, the entire group of "active" questions is attached. Only the "active" questions will be added to the selected parent survey (Parent Long or Parent Short) to create a custom "working" survey, as described in the next step. (Additionally, the options described later will allow the user not to show the questions on paper or on data entry forms.)

The export name assigned will be the name assigned to the exported data when creating the CSV (comma-separated-variables) file. The first record of the CSV file will contain the name of its corresponding field in the data records that follow. When Excel (or other programs) import data from a CSV file, they will read the variable names assigned on the first record and make them into the "column" header for the variables that follow. Care must be taken in assigning unique names. Also, programs such as SPSS will read the file, but, if a duplicate name is encountered, undesirable results may occur. The caption property is used in Data Recap and other reports.

Once all of the site questions are entered, the new survey can be created.

The software is easy to use, but the questions you pose must be thought out for the audience, and, the frame of reference of the Business Retention and Expansion goals for your community.

The deviation from using the "Preinstalled" working surveys should not be decided upon lightly. Although the Business Retention goals and the whole subject of "Local Issues" being surveyed together is a site decision, that decision should be one that keeps the goals focused.

For more information on the crafting of questions for local needs, see the Kansas *BusinessFirst* Self Guided Manual.

2. **Creating a *custom* "working" survey (optional) .** The user may wish to customize either of the existing parent surveys to fit their local survey needs more closely by using the site-specific questions created. From the Main Control Panel, click on the "2: Develop Questions and Surveys" tab. Then,

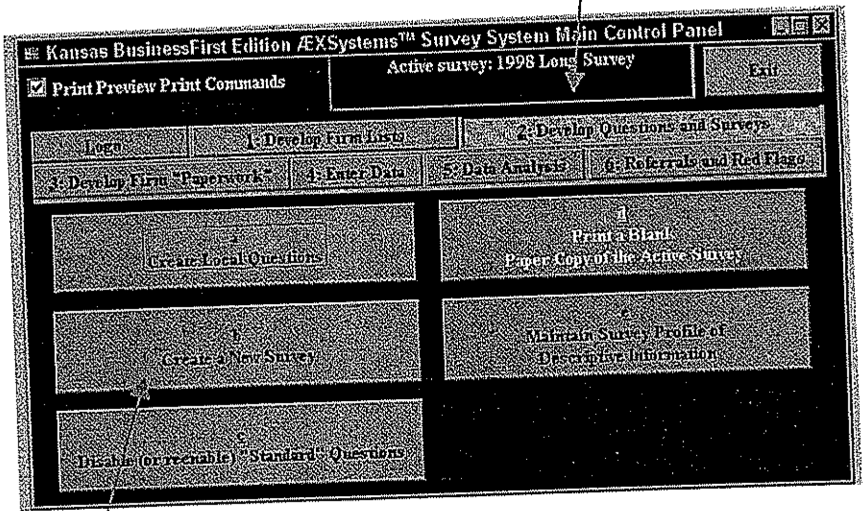


Figure: Main Control Panel Tab 2: Develop Questions and Surveys.

if you want to create a new survey directly, click on the "Create New Survey" button.

A form will appear that allows survey "cloning". Type the name of the new survey (as designated by the local coordinator) in the Survey ID blank. For this example the id "1997 Site Special" has been entered for illustration. Select either the **parent long** or the **parent short** survey as the base survey.

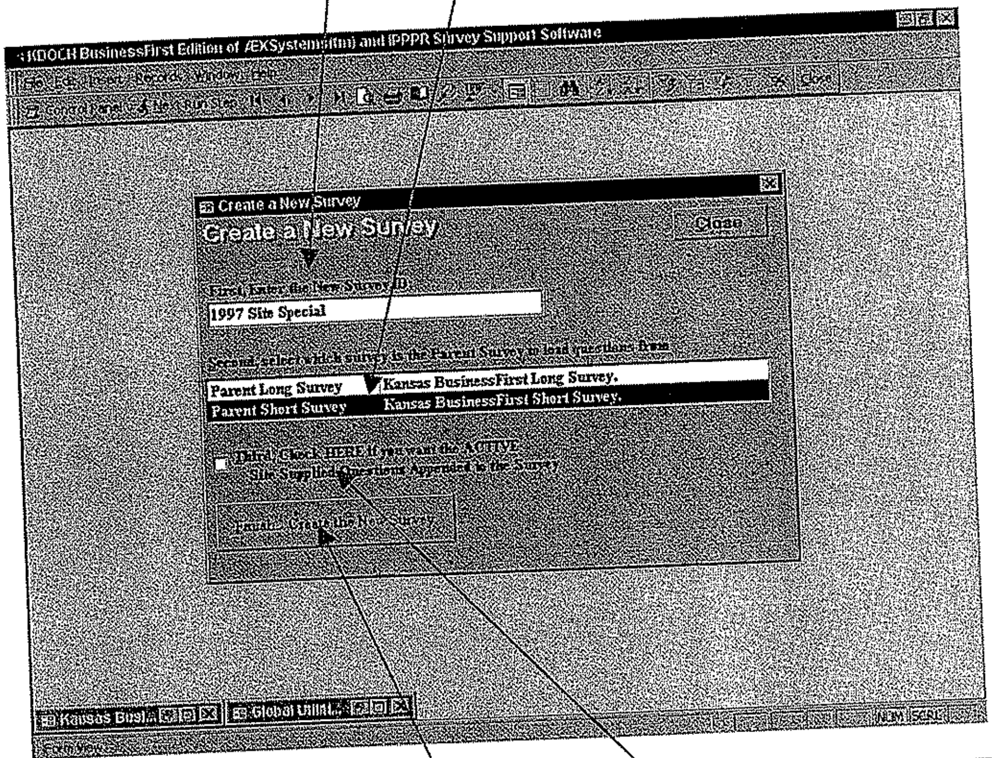


Figure: Create a New Survey form.

To customize the survey with site-specific questions (optional), choose the option denoted as the Third "step" in the creation, ie: "Check HERE if you want the ACTIVE Site Supplied Questions Appended to the Survey". The site-specific questions, created and activated in the previously described step, are now added to the parent short survey.

After all options are "filled in", click the "**Finish…Create the New Survey**" button.

A dialogue box will appear confirming that the survey was created. Click the "OK" button, and the new working survey is now activated as the Active Survey.

To further customize the new survey, you can change its title descriptions, SurveyID and BIO information that appear on reports.

To do this, click on the tab labeled "Tab 2: Develop Questions and Surveys" of the Main Control Panel, then click on the "Maintain Survey Profiles of Descriptive Information" button. The "Maintain Survey Profiles" form will appear.

It should already be positioned on the new survey after a "cloning".

Use the VCR Style buttons to select the profile of the survey you wish to view. (The program contains two parent surveys for cloning which do not appear in this form. New surveys can only be "cloned" from a parent survey and not from a working survey which has been previously created.)

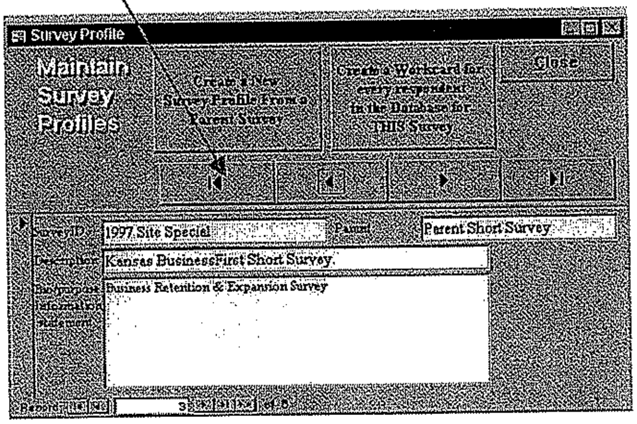


Figure: Maintain Survey Profiles Form..

As you navigate, the Active Survey is being set to the SurveyID shown on the form. Closing the form leaves the Active Survey set to the SurveyID of the form you were viewing when you clicked on the Close button.

This is an alternate method for setting the Active Survey.

The new survey will now appear in the list of surveys displayed when clicking on any of the "Set the Current Active Survey" buttons of Tabs 4,5,and 6 of the Main Control Panel.

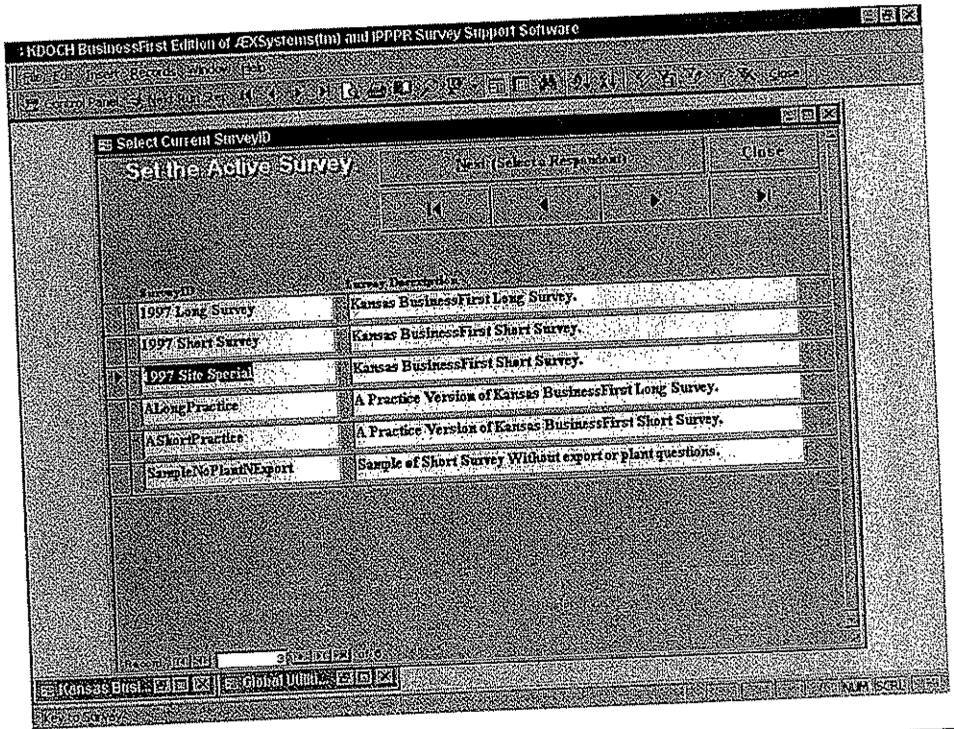


Figure: Set the Active Survey form.

From the **Set the Active Survey** form, use the mouse or arrow buttons to select a survey in the list. Note that the recently created survey is already selected. This survey will be used for the remainder of these instructions. Clicking "Close" will maintain the survey selection and return to the Main Control Panel.

Note: This form will be invoked at least once every time you use the software. You need to set the Active Survey to communicate to the software what survey to operate upon for many different activities. These "Active Utilities" only appear in the control panel when an Active Survey is selected.

Note: The Next Run Step button on the Toolbar will prompt for an active survey to be set. Each time you click on the Next Run Step button, the software proceeds toward data entry. It will ask for a SurveyID to be set, and a RespondentID to open the Work Card. When a Work Card displays, the Next Run Step button will launch into the data entry "run" of the survey.

3. **Print a paper copy of the survey for review.** At this time it is helpful to see the survey exactly as the firms will see it. Click on "Tab 2: Develop Questions and Surveys" of the Main Control Panel.

   Then click on the "Print Blank Paper Survey" button.

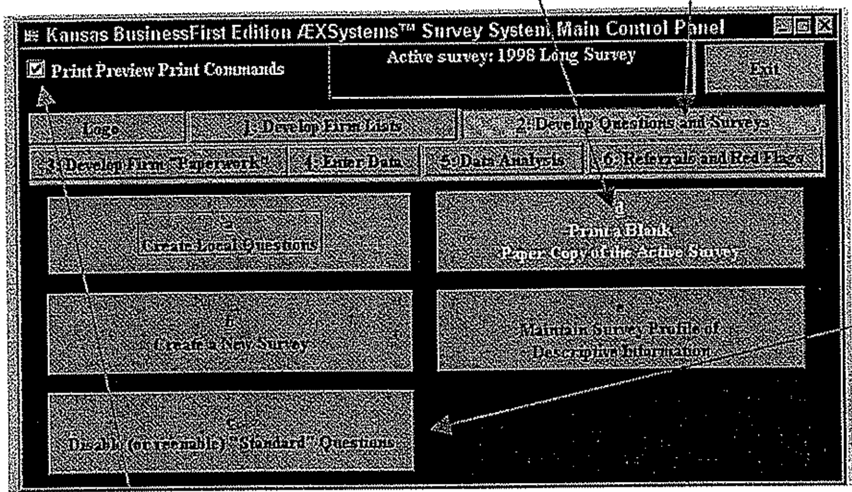


Figure: Main Control Panel Tab 2: Develop Questions and Surveys.

   If the "Print Preview Print Commands" option is checked, the user will then preview the current active survey on the form. Click the printer icon from the toolbar at the top of the form to print a "previewed" document.

   If the user now decides to create additional site-specific questions and attach them to the survey, the user should return to the instructions previously listed for creating site-specific questions. The user will need to create a new survey and attach site specific questions as instructed. *Note* that a new survey name must be used. Methods for deleting unwanted surveys are later described in *System Maintenance*.

   If, alternatively, the user finds that some survey questions should not be included, then the user need only choose to not include them in the printed paper copies and the data-entry forms by following the procedures described below.

4. **Determine which questions from the parent survey will not be used.** Although the software has provided an integrated set of survey questions, the user may decide that some questions are better replaced by site-specific

questions. Or, it may be decided that some parent survey questions just do not apply to the local site's survey situation. Likewise, it may be determined that the custom survey created should not include a certain question. For whatever reason, the survey software allows the user to add and delete certain questions. (Some questions are "mandatory" and cannot be eliminated.)

Click on the "Develop Questions and Surveys" tab of the Main Control Panel" Then click on the "Disable or (reenable) Standard Questions" button. (See figure on prior page).

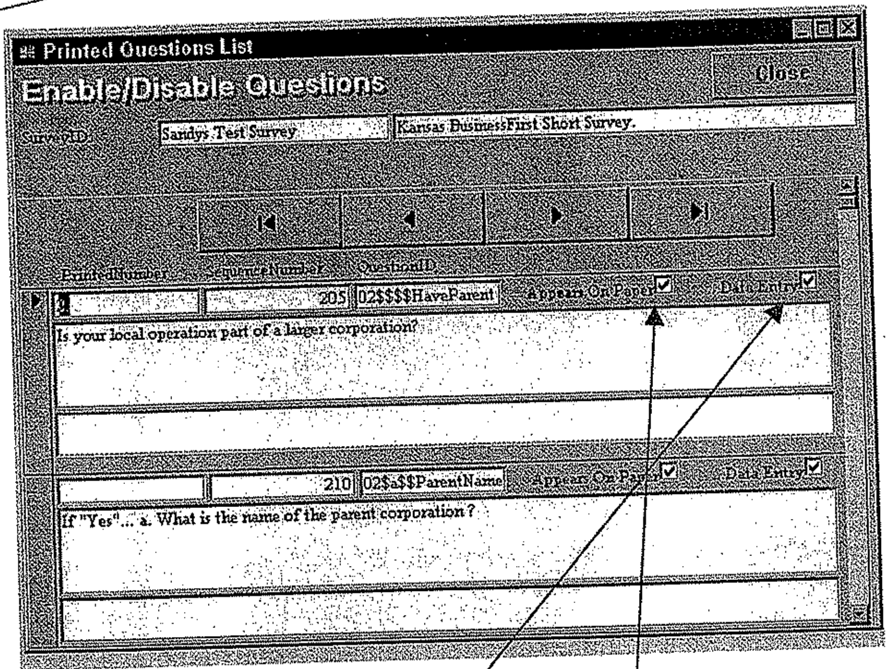


Figure: Enable/Disable Questions form.

A list of all the questions contained in the current active survey which can be "disabled" by the site will be presented, including the site-specific questions that may be attached to a custom survey. This **Questions Operations List** form allows for movement between the questions with the arrow keys.

There are two check-boxes to click on: the "Appears on Paper" and the "...Data Entry" check-box options. In order for a survey question to *not* appear on the paper survey or in the data-entry entry forms, simply click on the check boxes so they appear "unchecked" or empty.

Print the "Survey References to Questions" to see which questions appear on which surveys. Run the report by clicking on the "LOGO" tab of the Main Control Panel form, the clicking on the "Advanced Features" button, the click on the "Print Survey References to Questions" button.

The user may choose not to include survey questions that originated from the parent survey or as site-specific questions. (*Note* that the user is only able to include or not include existing survey questions from the printed forms and data-entry forms of the survey. The user cannot add new questions. The questions that you disable still remain part of the survey.) The survey questions will continue to appear or not to appear on paper and in the data-entry forms as selected even after the survey is complete.

It is necessary to review the survey questions, and their status, and the site-specific questions and their status (via the separate procedures described above). This is true whether you are beginning a new one or repeating a survey at some future date.

5. **Renumber the survey questions (if necessary or desired)** . The renumbering of survey questions will not change automatically even if the user decides not to print some survey questions (previous step). For example, if chosen not to print questions #10, question #9 will be followed by questions #11 and no #10 will appear.

   To renumber the questions that will be printed, merely change the "Printed Number" field to reflect the desired number to appear on the paper survey.

6. **Print one copy of the survey.** The survey prepared is the same for every respondent; only the cover sheets (prepared in the next phase) are different. Therefore, it is recommended that only one copy of the survey be printed and then photocopied to get the number of surveys needed.

   To print a blank copy of the survey, as it will be distributed, click on the tab labeled "2: Develop Questions and Surveys" located on the Main Control Panel. From that tab click on the "Print a Blank Paper Copy of the Active Survey" button.

Phase III

Create Firm "Paperwork"

2. **Create Work Cards for the survey respondents.** Work Cards are entries stored in the database that record the activity for each respondent of a working survey. A single respondent will have a separate Work Card for each survey answered. The Work Card facilitates the site's task of keeping track of many respondents' status is with respect to a working survey. The usage of this is subjective in many ways.

   It is recommended that the user become familiar with this form since all data entry must begin from this form. All survey "Work Card" tabs are discussed later in the manual.

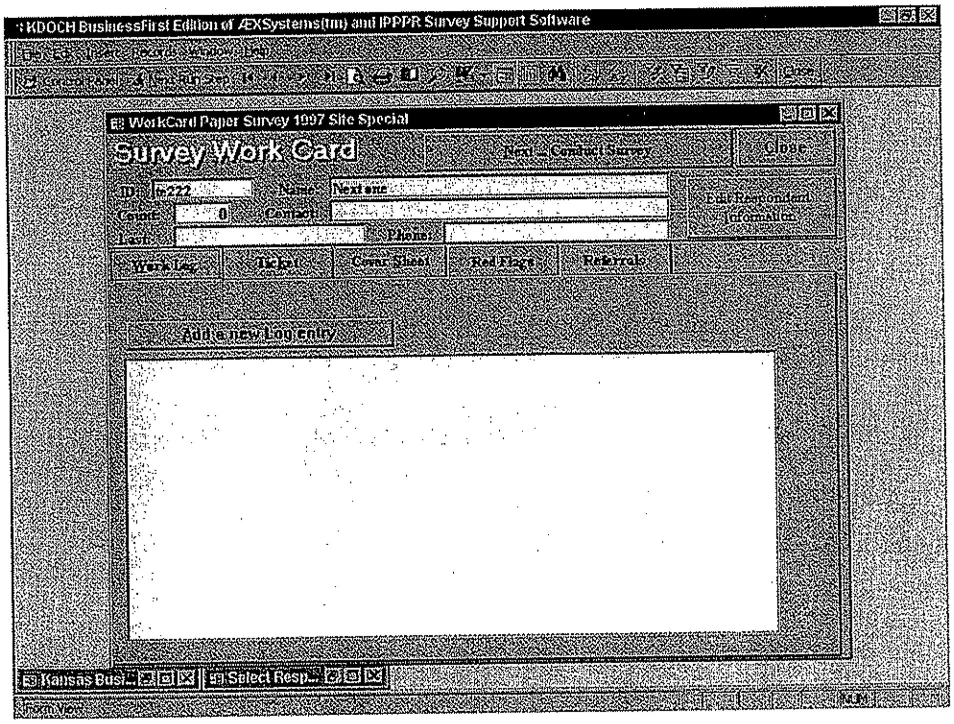


Figure: Survey Work Card form.

To conduct a survey of every respondent contained in the database, click on the "3: Develop Firm Paperwork" tab of the Main Control Panel. Then click on the "Create all Necessary "paperwork" for ALL Firms in the Respondent Database" button.

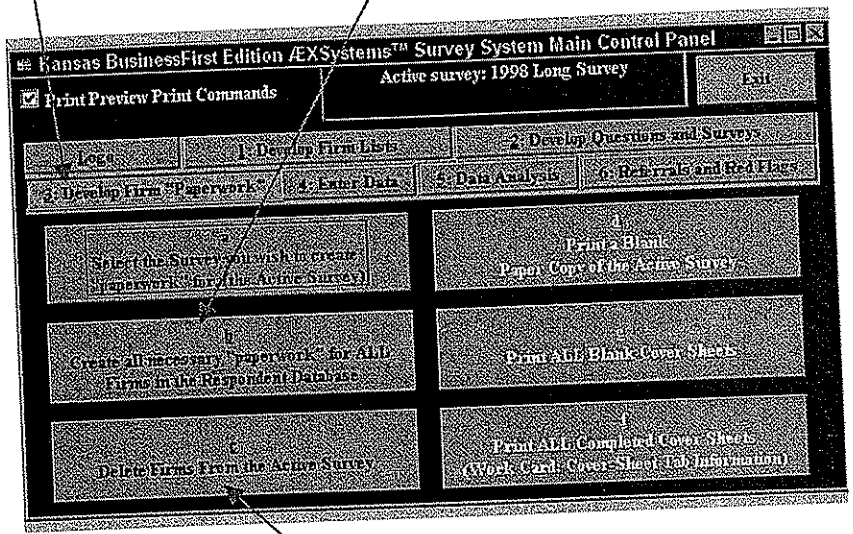


Figure: Main Control Panel Tab 3: Develop Firm "Paperwork".

If the user does not wish to survey all the respondents in the database, then delete the Work Cards of those respondents not to be surveyed.

To discard Work Cards , click on the "Delete Firms from the Active Survey" button, which is located below to the button for creating the Work Cards. The **Respondent Work Card and Data Deletion** form will appear and provide instructions on selecting respondents and deleting them from the active survey.

Note the multiple "Record Selectors". Clicking and holding the left mouse button while moving the mouse down can select a range to delete.

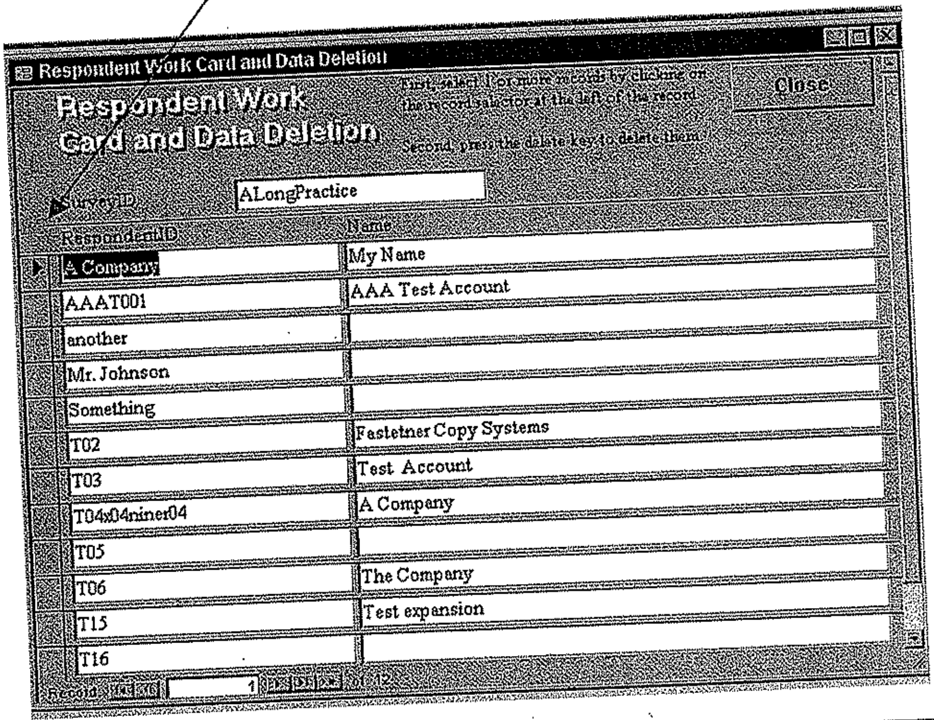
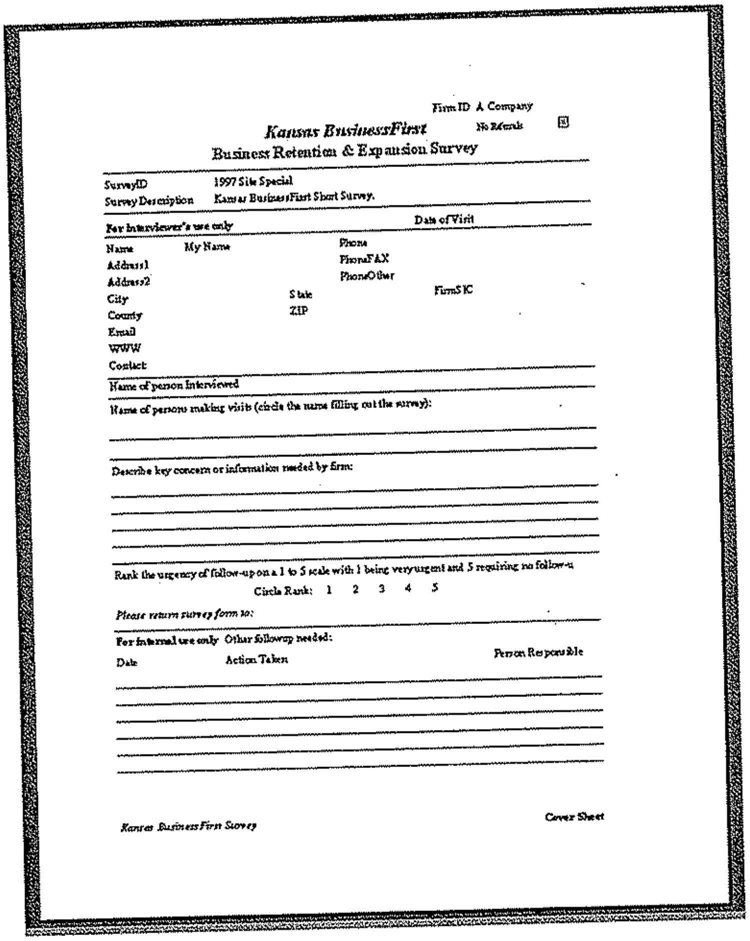


Figure: Respondent Work Card Data Deletion form.

3. **Prepare the Cover Sheets .** While each respondent will have a Work Card for each survey, a respondent will only have one cover sheet. The cover sheet is a working document used by the interviewer when directly working with the individual firm's contact people. It contains the static background information of the respondent as well as the history of the site's interaction with that firm.



Firm ID A Company
Kansas BusinessFirst No Recruit
Business Retention & Expansion Survey

SurveyID 1997 Site Special
Survey Description Kansas BusinessFirst Short Survey.

For Interviewer's use only Date of Visit

Name My Name
Address1
Address2
City
County
Email
WWW
Contact

Phone
PhoneFAX
PhoneOther
State
ZIP
FirmSIC

Name of person Interviewed

Name of persons making visits (circle the name filling out the survey):

Describe key concern or information needed by firm:

Rank the urgency of follow-up on a 1 to 5 scale with 1 being very urgent and 5 requiring no follow-u

Circle Rank: 1 2 3 4 5

Please return survey form to:

For internal use only Other followup needed:

Date Action Taken Person Responsible

Kansas BusinessFirst Survey Cover Sheet

Figure: Blank Cover Sheet sample

The cover sheet includes the name and title of the person interviewed.; the names of the people recording the survey; the key concerns expressed by the firm and the follow up urgency; and the names of the person with the local organization whom the form is to be returned (the visitation coordinator).

It is necessary that you enter background information into the system to create a Work Card. A a cover sheet can be printed for that respondent.

There are two types of cover sheets - "blank" and "completed." The blank cover sheets are cover sheets for each firm containing only the static background information about the firm. They contain designated spaces in which to write the other information. As part of responding to surveys, the firm will be asked to verify that this information is correct and/or to provide the correct information.

The blanks on the cover sheet are entered on the Cover Sheet Tab of the Work Card. From that a "completed" cover sheet can be printed.

The "completed" cover sheet contains all information stored in the database relating to the firm and the site's historical experience with the firm.

To prepare cover sheets for all the respondents attached to the active survey , click on the "3: Develop Firm Paperwork" tab of the Main Control Panel. Then click on the "Print ALL Respondent Blank Cover Sheets" button. The blank cover sheets for each of the respondents attached to a survey will be printed. One cover sheet will be attached per survey. The surveys are now ready to be distributed to the designated respondents. (For further information on Cover Sheets and distributing surveys, see the *KANSAS BusinessFirst* Self-Guided Manual.)

To print a completed cover sheet for only one respondent (or a selected number of respondents) at a time, go to the Work Card of the relevant respondent(s) and print the cover sheet individually.

Click on the "4: Enter Data" tab of the Main Control Panel. Then click on "Select the Firm's RespondentID you wish to enter response data for." button. Use the arrow buttons to select a respondent, and then Click on the "Next (Respondent Survey Work Card)" button. Click on the "**Cover Sheet**" tab on the Work Card.

Click on "Print Blank Cover Sheet" to print the blank cover sheet for this respondent only, or click on the "Print This Cover Sheet" to print the completed cover sheet for this respondent only.

Phase IV
Data Entry of Survey Responses

Data entry for a survey is a simple but precise operation. First, the operator selects the SurveyID to operate upon. Next, the RespondentID is set. With these two "keys" in place, the data entry can proceed through the Work Card.

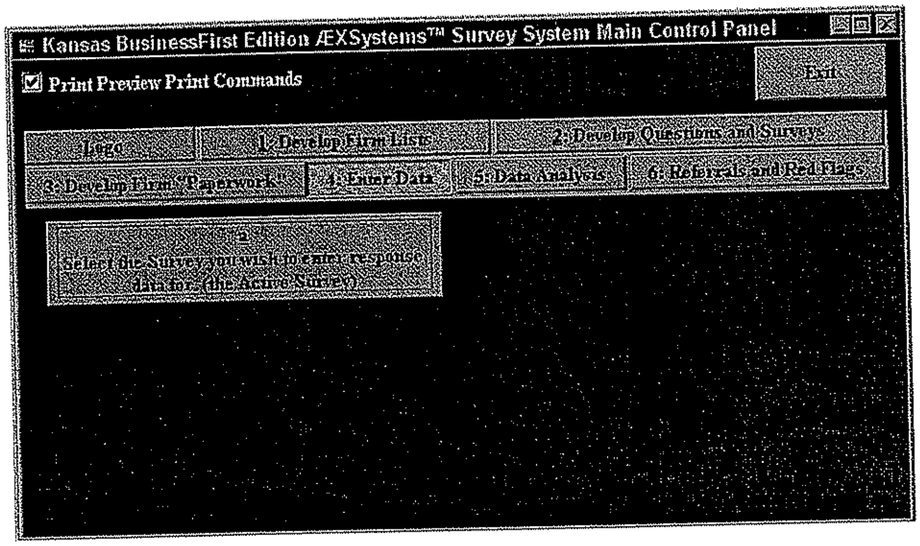


Figure: Main Control Panel Tab 4: Enter Data.

In the figure above, only the "Select the Survey…" button is shown. This means that a SurveyID is not set. On the next page, after the SurveyID has been set, a second button appears that will allow the selection of the RespondentID. The normal flow is enforced here, as well as in the "Next Run Step" button on the Tool-Bar, and the "Next…" buttons on the Select Survey and Select Respondent forms.

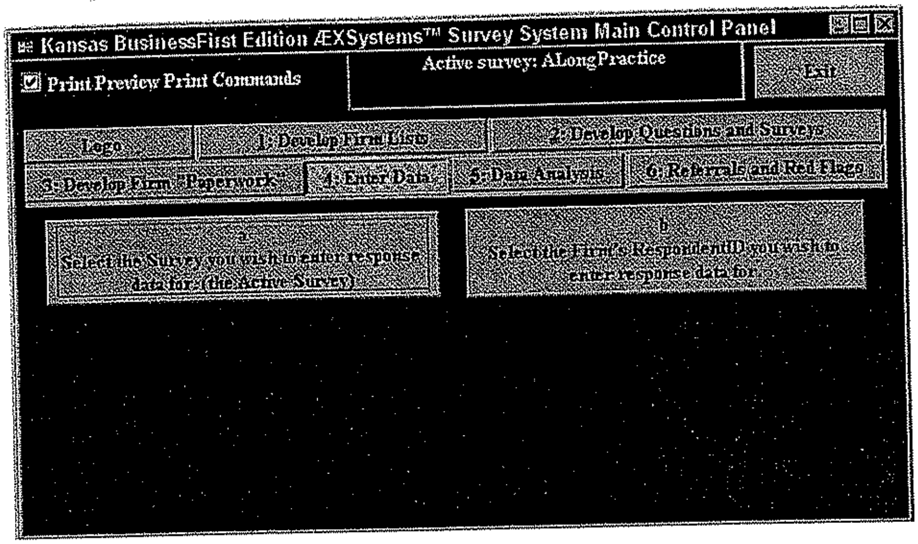


Figure: Main Control Panel Tab 4: Enter Data with Two Buttons Showing.

After the SurveyID is selected, but, no active RespondentID exists yet, the "Main Control Panel Tab 4: Enter Data" options appear as above.

After the RespondentID has been set, all three option buttons appear. The third allows the operator to go directly to the Work Card of the respondent for the active survey.

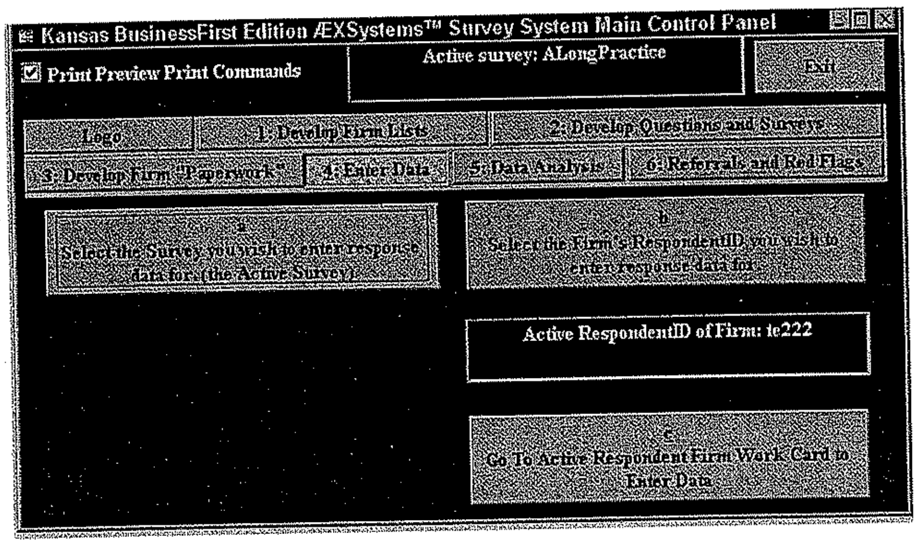


Figure: Main Control Panel Tab 4: Enter Data with All Buttons Showing.

1. **Begin the task of Data Entering Survey Responses.** The task may be fairly lengthy and time consuming, depending on the number of surveys. The system is designed to allow the user to interrupt data entry work and begin again at a later time. It is recommended, however, that the data entry of an entire survey be completed before work is interrupted.

   Be certain to activate the appropriate survey for data entry. Click on the "4: Enter Data" tab of the Main Control Panel. Then Click on the "Select the survey you wish to enter response data for" button. From the Set Active Survey form, use the arrows or mouse to select the appropriate survey. Do not close this form now; the user will need to continue in the path of "next" buttons. Clicking the "Next Run Step"; or, clicking on the "Next (Select a Respondent)" button will cause the program to select the "next" step for data entry.

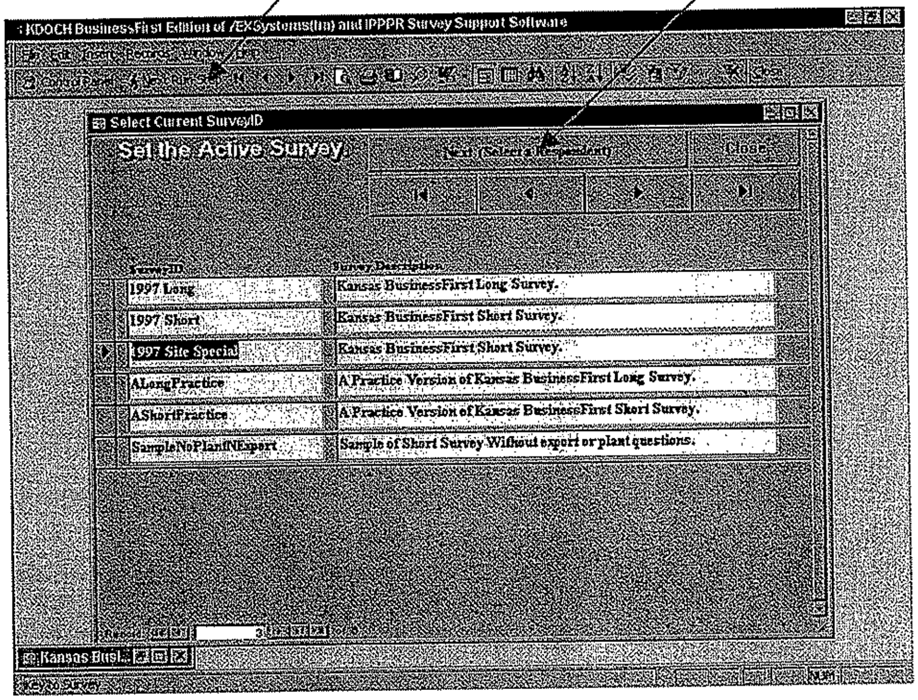


Figure: Set the Active Survey form.

2. **Proceed with data entry by identifying the respondent .** Click on the "Next (Select a Respondent)" button from the **Set the Active Survey** form. From the "Select a Respondent" form, use the arrows or mouse to select the respondent (firm) whose survey responses are to be entered at this time.

Note: Double clicking on the Survey ID will also continue to the "next" step of data entry (selecting a respondent).

If the respondent is listed on the form, then a Work Card already exists for the firm for the current active survey. (This will be the case if the prior instructions were followed.) Select the respondent and then select the "Next (Respondent Survey Work Card)" button or the "Next Run Step" button on the Toolbar.

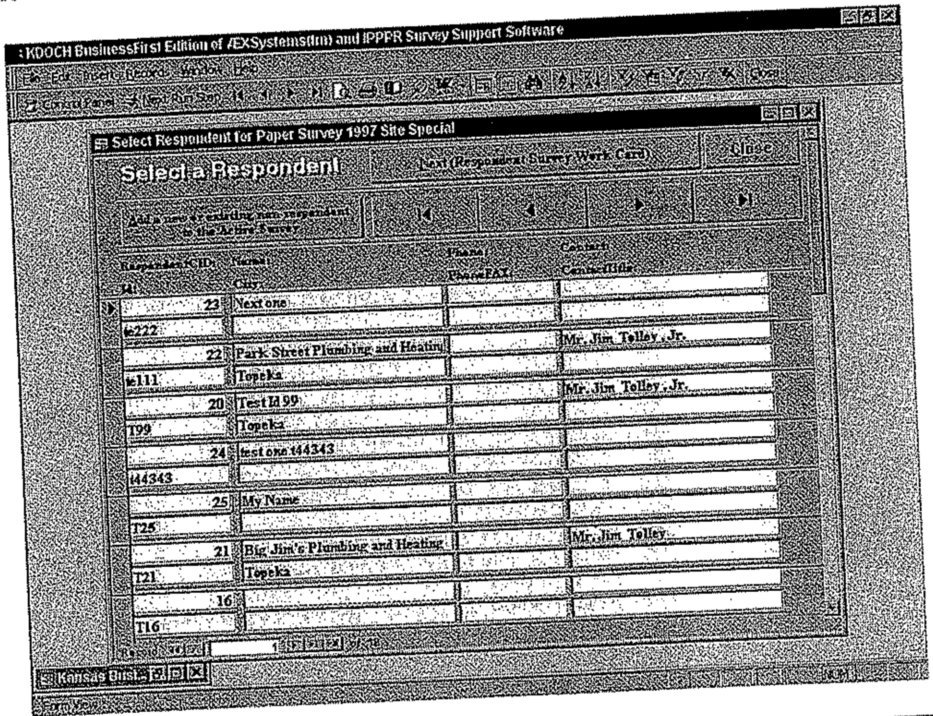


Figure: Select a Respondent form.

Add a respondent to the survey . For various reasons it may be necessary to add a respondent to the survey: 1) the appropriate respondent may already be in the system but is not attached to this survey with a Work Card; 2) the user has opted not to enter respondent information into the system before distributing the surveys, or 3) the user has a new respondent not in yet entered into the database. This new information can be entered *now* as part of entering survey responses.

From the **Select a Respondent** form, click the "Add a new or existing non-respondent to the active survey" button.

Use the arrow buttons (or use the "Find" button on the Toolbar after clicking on the "name" field) on the "Maintain Respondents" form to select a respondent already entered into the system you wish to attach to the active survey). Click on the "Create and Go to Work Card of this Respondent for the Current Active Survey" button.

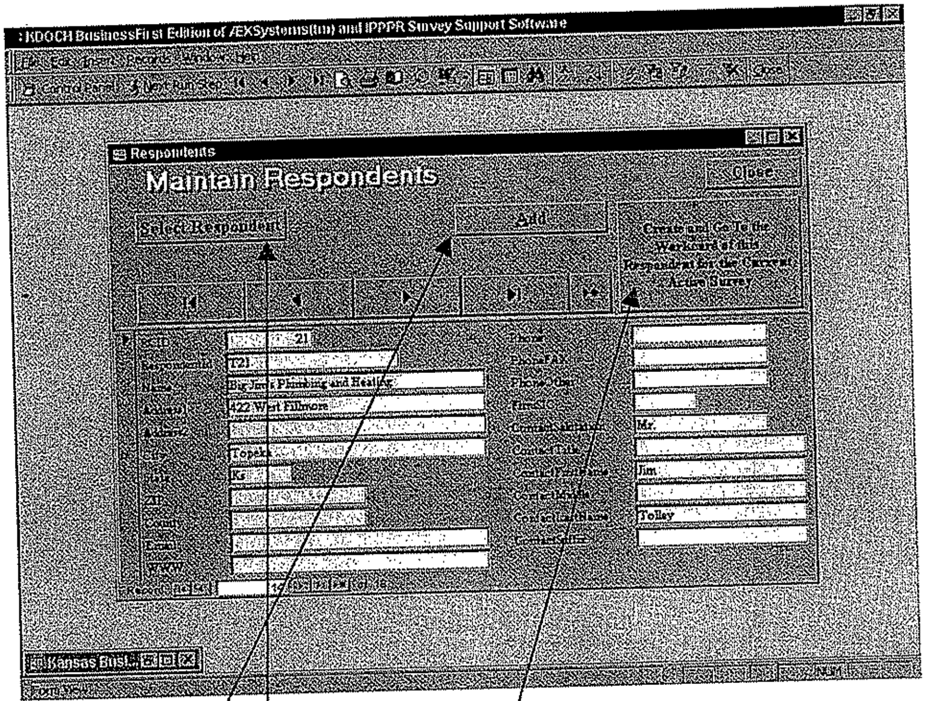


Figure: Maintain Respondents form.

If entering a new respondent not already contained in the system, click on the "Add" button (or the "arrow-asterisk" button). Enter the static information, and then, click on the "Create and Go to Work Card of this Respondent for the Current Active Survey" button.

Note: Clicking on the "Select Respondent" button instead from the "Maintain Respondents" form will send the user back to the Select a Respondent form.

3. **Proceed with data entry .** The system is set to begin data entry of survey responses for a particular respondent, and the Work Card of that respondent now appears on form.

   If the identifying information displayed at the top of the Work Card is incorrect, edit it now, clicking on the "Edit Respondent Information" button. Correct the information in the **Maintain Current Respondent** form and select "Close."

   The Work Card is composed of five tabs: Work Log, Ticket, Cover Sheets, Red Flags, and Referrals.

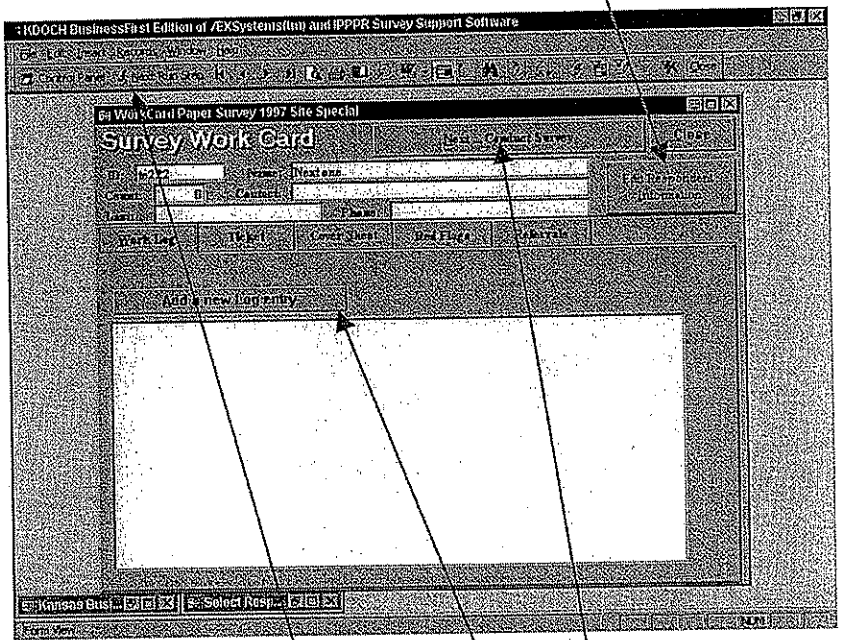


Figure: Survey Work Card form.

The **Work Log** tab maintains a record of all the times that Work Card has been attended. It automatically records the time, date, and person responsible for data entry. By clicking on the "Add a New Log Entry" button, additional notes may be added as deemed appropriate by the project manager.

To begin entering survey responses, click on the "Next...Conduct Survey" button. Clicking on the "Next Run Step" button on the Toolbar will accomplish the same thing from this form.

The **Run Survey** form appears, allowing the user to enter the survey responses for this respondent. The following "methods" apply.

1) All text and numbers are entered into the "data entry" area as appropriate to the question being asked.

2) For "single" answer (only "one applies type" question-answers) multiple choice questions, use the keyboard arrow keys to highlight the correct answer and press the "Enter" key to continue to the next question. Or, use the mouse and double-click on the correct answer, which will move you to the next question.

3) For "check all that apply," style answers, use the arrow keys and the space bar to toggle the selection, or use the mouse as described next.

4) For "check all that apply" style answers, click response options once to toggle the current selection. When finished, press the VCR [Next] button or press the "Enter" key. The next question displays.

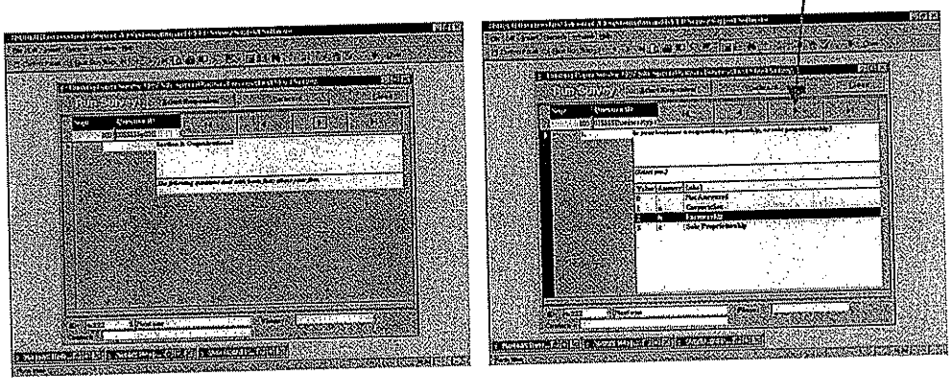


Figure: First and Second items in Data Entry forms.

If you want to change an answer, use the page-up and page-down keys to "navigate" backward or forward (respectively). Find the question and then correct the answer. A flashing yellow box appears if the system detects a problem with the data entered. An error may result from not entering data or from entering data outside of the specified range. In the case of an error, verify the answer and change it; or if the information is correct, press the "Enter" key again to override the error message.

After entering all the data from a complete survey, the system asks the user to return to the Work Card. The "Work Card" button takes the user back to the Work Card of this Respondent.

To continue with entering the responses from the survey of another respondent , click on the "Select Respondent" button. Proceed by following the instructions outlined above.

A note about Data Entry Phase program problems.

When you have worked for over an hour in the software performing the data entry phase, you should exit and "compact" the database.

The program utilizes Microsoft® Access® Runtime support. That support software uses the database as a scratchpad during data entry operations. After a while, the database begins to get bloated.

The software will begin to fail while performing data entry. Do not panic. It usually means that a compaction run is necessary. In thousands of data entry runs, no data loss has been caused by this failure.

To correct the problem, simply exit the software and launch the Compact Survey Database option found but pressing the Window's "Start" button, click on "Programs", then click on "Kansas BusinessFirst Menu" then "Compact Survey Database".

The Survey Work Card: An Overview

Each respondent attached to a survey must have a Work Card.

The Work Card of a respondent displays the respondent ID number, the names of the respondent firm, the contact person, and the firm's phone number. This information may be edited by clicking the "**Edit Respondent Information**" button, which leads to the Maintain Current Respondent form.

The "**Next...Conduct Survey**" button leads to the survey response data entry form.

The Work Card also contains five parts. Each of these is accessed by clicking on the appropriate "tab" – Work Log, Ticket, Cover Sheet, Red Flags, and Referrals (just like the Main Control Panel's tabs.)

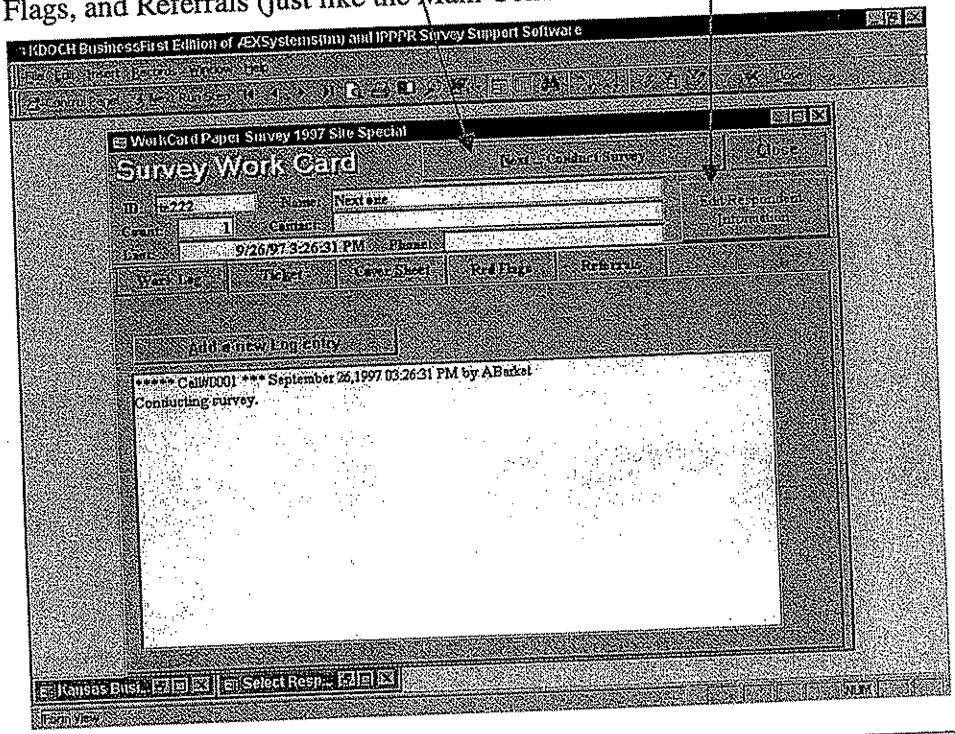


Figure: Survey Work Card

The "Work Log" tab displays the history of the active survey activity with the current respondent. The program automatically records information regarding times of data entry. See the "Ticket" tab; it contains additional historical information.

The "**Add a New Log Entry**" button opens a green data entry box. Above the box are the option buttons "**Keep the New Log Entry**" and "**Cancel**." The user may add to the log as deemed appropriate. Choosing to "Keep" the new entry will enter it into the yellow form displaying the record of log entries. The newer entries are displayed at the top of the list.

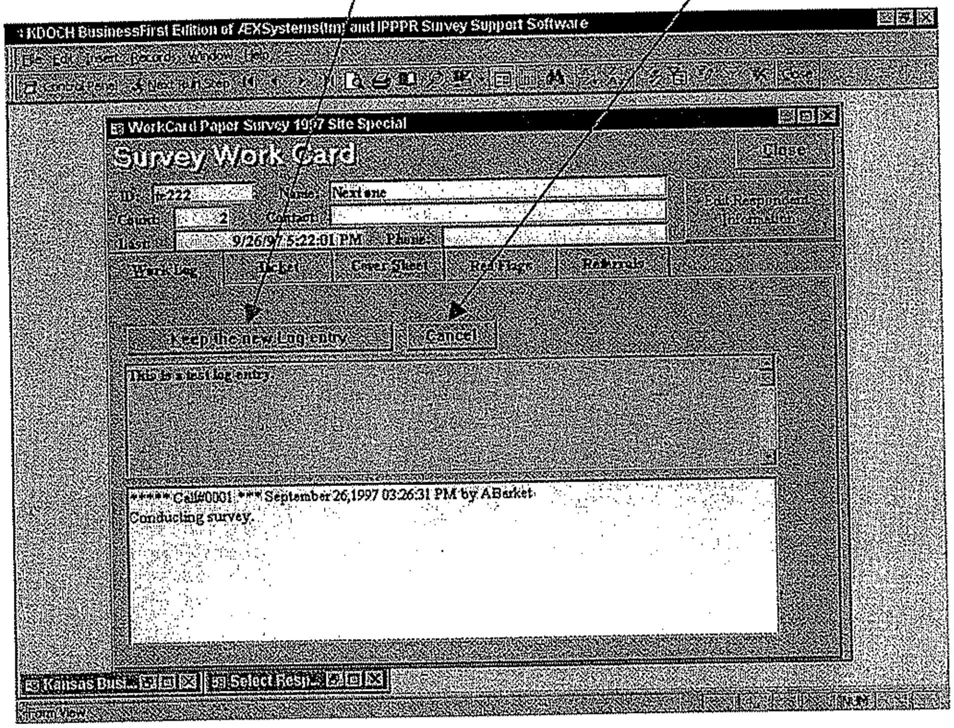


Figure: Survey Work Card, Work Log Tab.

The "Ticket" tab displays historical information useful to a survey lab operation, but it can also be useful to the user/site to track activity of a specific survey. It is included in this edition because it was already a part of the ÆXSystem Survey Software. (Some of the items on this tab are not updated in this release of the software.)

The information and functions of the ticket can be incorporated into the Site's operation as the Site may determine necessary. The more surveys a Site has to track, the more "useful" this information and the Work Log information can be when performing telephone follow-up and other "Respondent" contact.

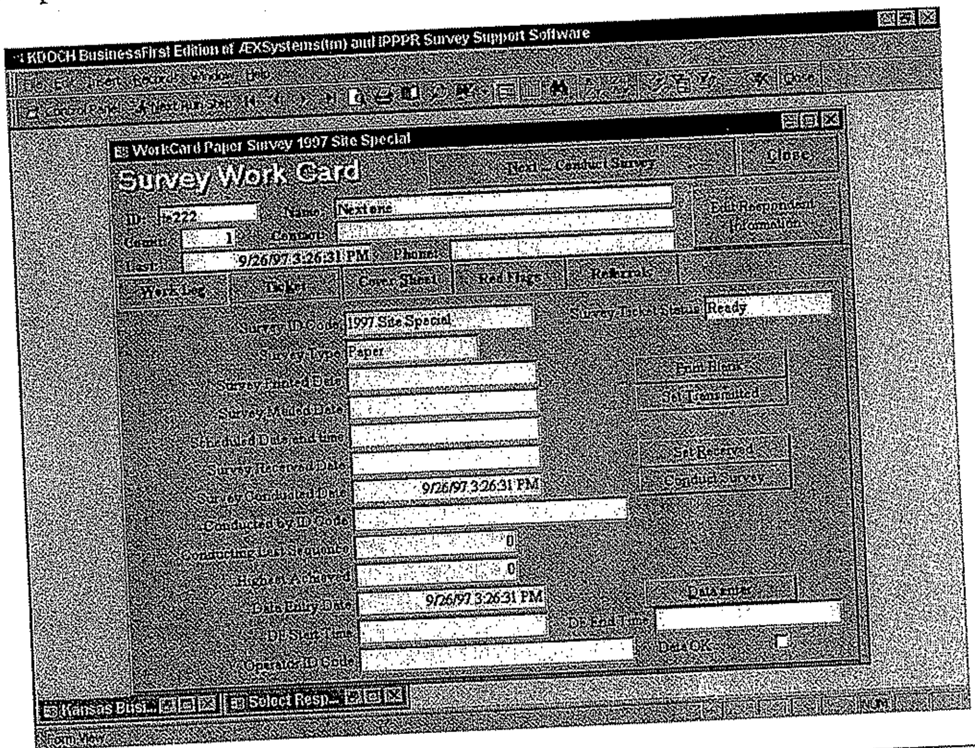


Figure: Survey Work Card, Ticket Tab.

The "Cover Sheet" tab allows the user to maintain the information found on the paper Cover Sheet form.

From this tab, the operator can print a single custom or blank cover sheet for a particular respondent from the Work Card by selecting either the **"Print Blank Cover Sheet"** button or **"Print this Cover Sheet"** button. (The option on the Main Control Panel tab labeled "3: Develop Firm Paperwork" allows the user only to print all cover sheets for the entire group of respondents attached to the survey.)

A section of this form called "Other Follow-up Actions" allows the user to enter the name of the person making a visit. The date of the visit (defaulted to date of data entry), and any notes regarding the visit and/or respondent can be recorded and/or viewed.

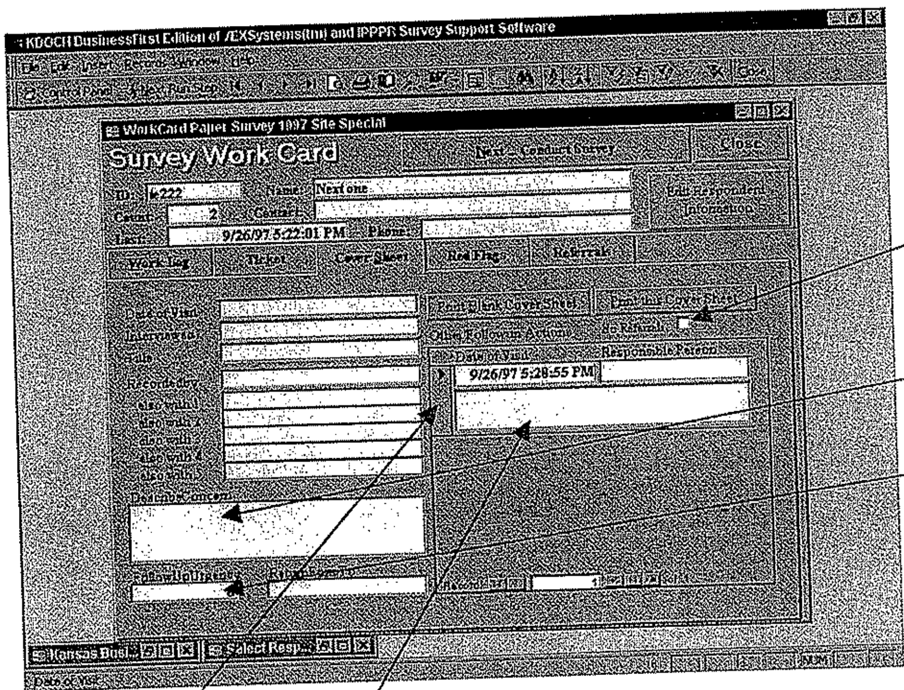
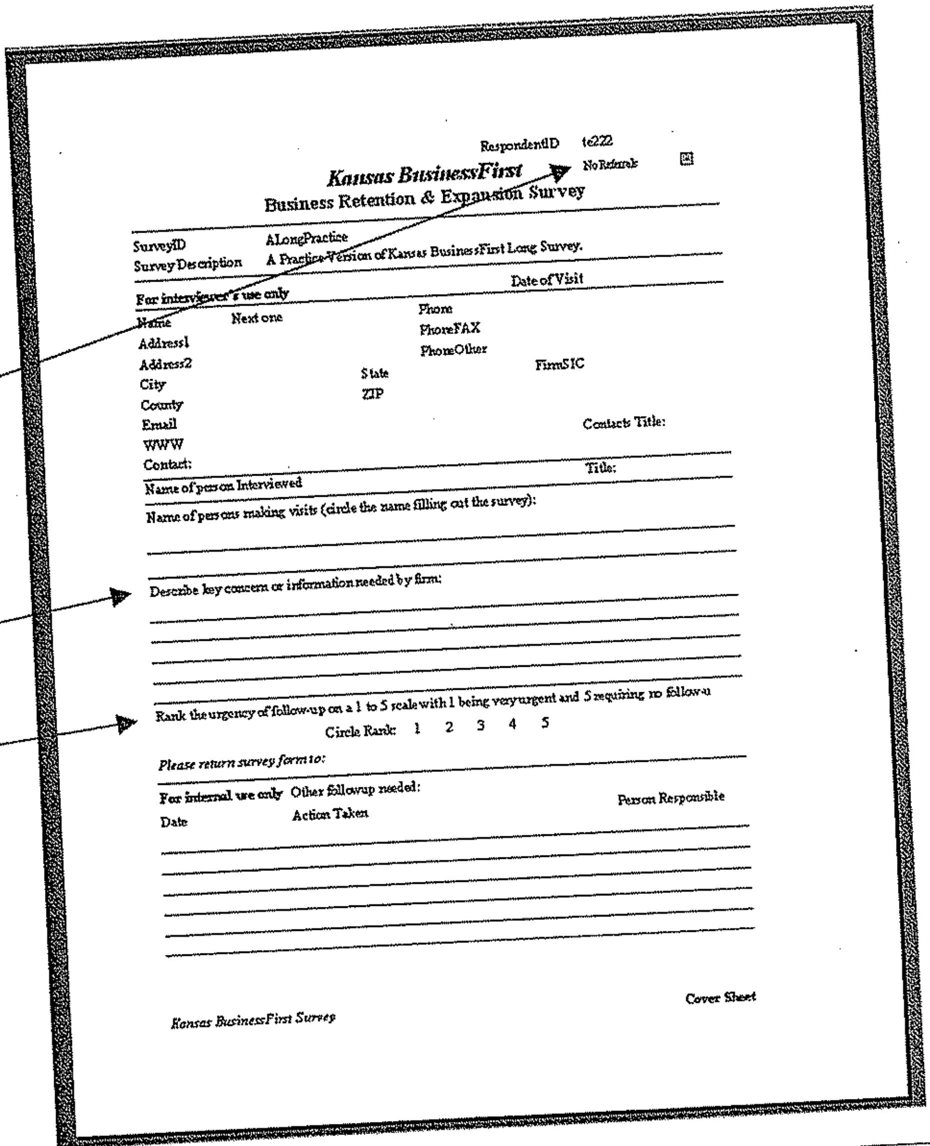


Figure: Survey Work Card, Cover Sheet Tab.

In order to delete the "Other Followup Actions" entries use the "Record Selector" to "select" the record, and press the "Delete" key on the keyboard.

All the information obtained from a completed Cover Sheet may be data entered onto the tab of the form. The information that is recorded on the "Cover Sheet" tab of the "Work Card" includes the same items as appear on the Cover Sheet paper form. This information should be recorded for each visit the site makes to the firm.



RespondentID te222
NoReferrals

Kansas BusinessFirst
Business Retention & Expansion Survey

SurveyID ALongPractice
Survey Description A Practice Version of Kansas BusinessFirst Long Survey.

For interviewer's use only Date of Visit

Name Next one
Address1
Address2
City
County
Email
WWW
Contact:

Phone
PhoneFAX
PhoneOther

State
ZIP

FirmSIC

Contacts Title:
Title:

Name of person Interviewed

Name of persons making visits (circle the name filling out the survey):

Describe key concern or information needed by firm:

Rank the urgency of follow-up on a 1 to 5 scale with 1 being very urgent and 5 requiring no follow-u

Circle Rank: 1 2 3 4 5

Please return survey form to:

For internal use only Other followup needed: Person Responsible
Date Action Taken

Kansas BusinessFirst Survey

Cover Sheet

Figure: Cover Sheet

The "Red Flags" tab contains a listing of red flags detected by the software for this respondent and this survey.

Note: Red Flags and Referrals are automatically calculated after data entry.

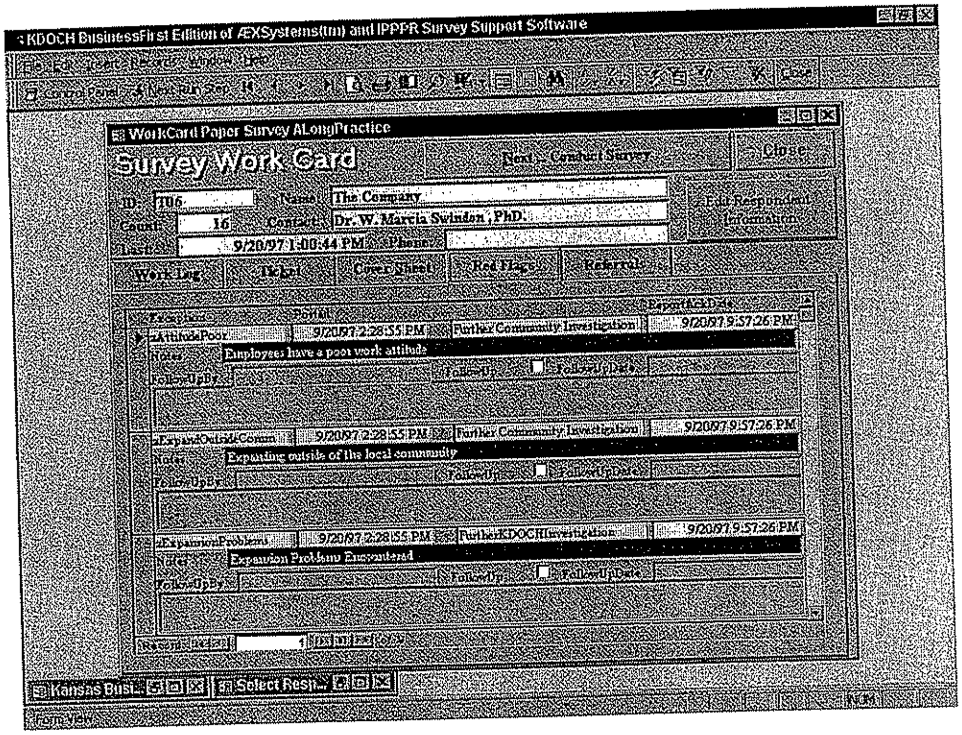


Figure: Survey Work Card, Red Flag Tab.

This tab contains some follow-up check-boxes and note space. The usage of these follow-up tools is entirely up to the site. It is recommended that each site evaluate the usage of this and the companion "Referrals" tab for all follow-up fields.

Then, consider how they can show your progress in dealing with the agencies and the firms you are connecting.

The "Referrals" tab contains a listing of referral agencies recommended by the software for this respondent and this survey.

Note: Red Flags and Referrals are automatically calculated after data entry.

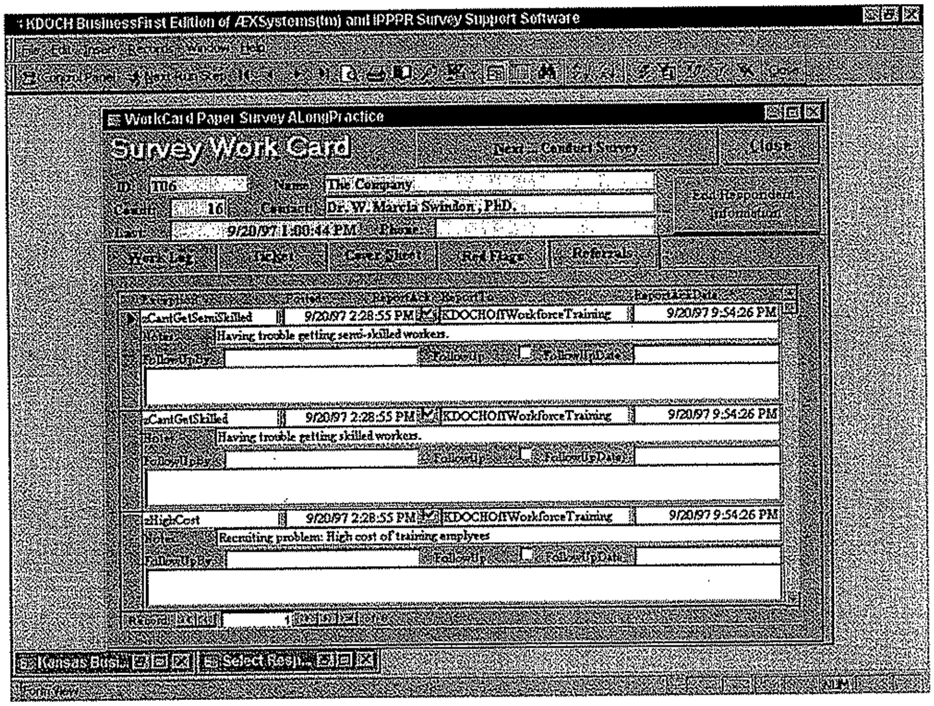


Figure: Survey Work Card, Referrals Tab.

This tab contains some follow-up check-boxes and note space. The usage of these follow-up tools is entirely up to the site. It is recommended that each site evaluate the usage of this and the companion "Red Flags" tab for all follow-up fields.

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A note about Data Entry Phase program problems.

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Phase V

Reporting the Survey Results

Prepare Executive Reports and Progress Checks (optional) . At any time during the data entry phase or after its completion, a visual representation of the number of responses received and entered may be viewed.

Click on the "A5: Data Analysis" tab of the Main Control Panel. Then, click on the "Print Exec Response Density Report" button to view a graphic illustration of the number of responses received and entered to date per individual question. More discussion follows.

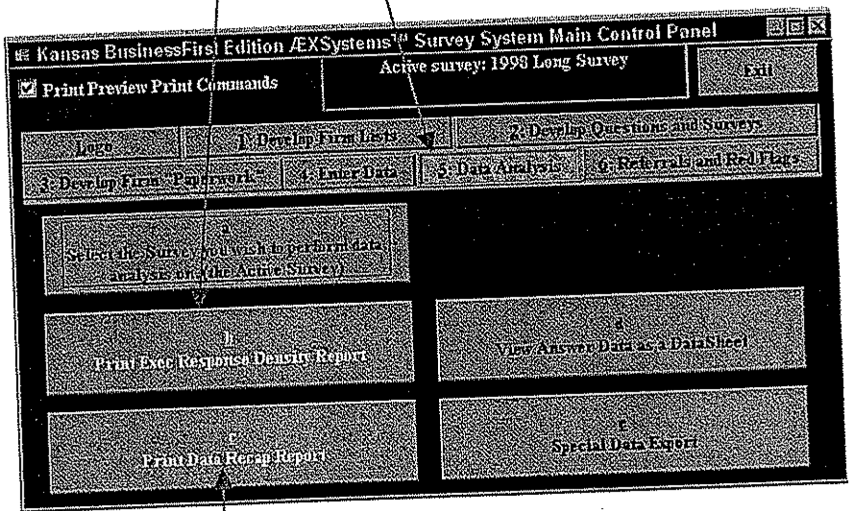

Figure: Main Control Panel Tab 5: Data analysis.

Click on the "Print Data Recap" button to provide a report detailing the frequencies and percentages of responses for each survey question.

These options work well to check data entry progress as well as to identify which questions received the greater or less number of responses. (For more information about analyzing and interpreting the data, see the *KANSAS BusinessFirst* Self-Guide Manual.)

The "Print Exec Response Density" button produces the "Executive Summary of Question Response Density" report.

This report illustrates in bar-chart form the relationship of unanswered .vs answered questions. It provides a quick visual report of the numbers of survey questions that have been answered by numbers of respondents attempted. It can be prepared at any time after work cards are created (Phase III) to display data-entry progress. Some analysis will be meaningless until a larger sample of answers exists. This report, when "Full" (greenbars and not yellow), means that it might be robust data set for analysis purposes.

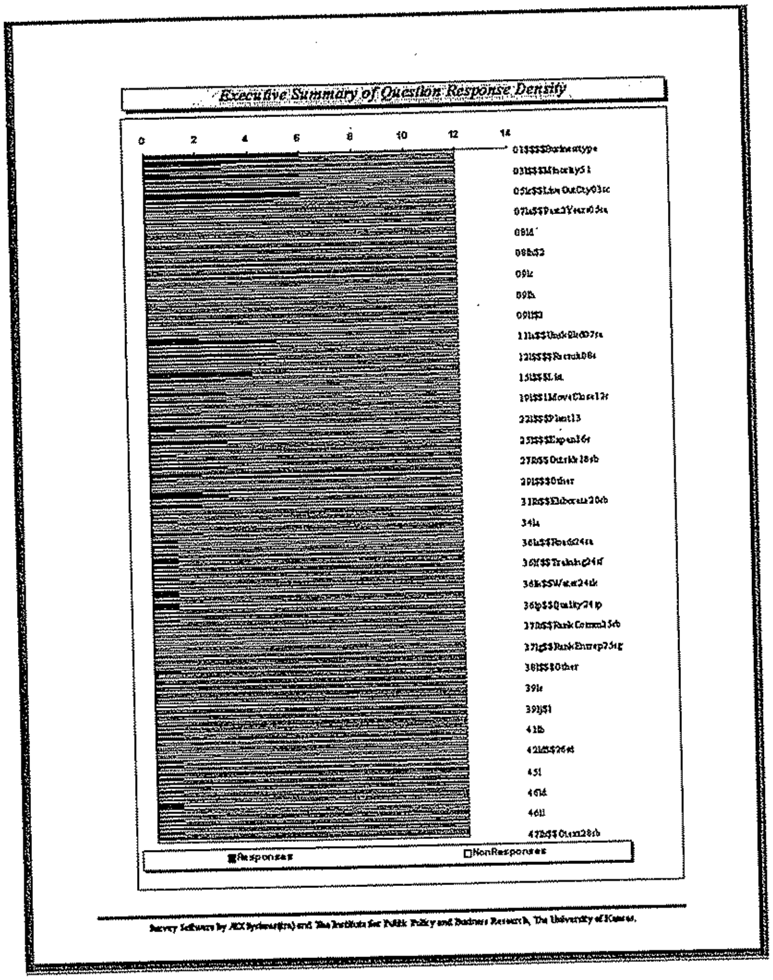

Figure: Executive Summary of Question Response Density Report

The "Executive Summary of Question Response Density" also provides some Statistics in the form of percentages answered and not-answered questions.

Executive Summary of Question Response Density Statistics

Question ID	Responses	Percent Responses	Non Responses	% Non Responses	Respondents Surveyed
01$$$$Businesstype	6	50.00%	6	50.00%	12
02$$$$HavParent	6	50.00%	6	50.00%	12
02$a$$ParentName	3	25.00%	9	75.00%	12
02$b$$ParentCity	3	25.00%	9	75.00%	12
02$c$$ParentState	1	8.33%	11	91.67%	12
03$$$$Minority51	6	50.00%	6	50.00%	12
03a$$LongMin	3	25.00%	9	75.00%	12
04$$$$Women51	6	50.00%	6	50.00%	12
05a$$FullTime03sa	7	58.33%	5	41.67%	12
05b$$PartTime03sb	6	50.00%	6	50.00%	12
05c$$LiveOutCity03sc	6	50.00%	6	50.00%	12
06a$$StartWage04sa	5	41.67%	7	58.33%	12
06b$$Benefits04sb	5	41.67%	7	58.33%	12
06c$$Benefits04sc	4	33.33%	8	66.67%	12
06d$$OtherBen04sd	0	.00%	12	100.00%	12
07a$$Past2Years05sa	6	50.00%	6	50.00%	12
07b$$Count05sb	2	16.67%	10	83.33%	12
08a	0	.00%	12	100.00%	12
08b	0	.00%	12	100.00%	12
08c	0	.00%	12	100.00%	12
08d	0	.00%	12	100.00%	12
08e	0	.00%	12	100.00%	12
08f	0	.00%	12	100.00%	12
08g	0	.00%	12	100.00%	12
08h$1	0	.00%	12	100.00%	12
08h$2	0	.00%	12	100.00%	12
08i$1	0	.00%	12	100.00%	12
08i2Other	0	.00%	12	100.00%	12
09a	0	.00%	12	100.00%	12
09b	0	.00%	12	100.00%	12
09c	0	.00%	12	100.00%	12
09d	0	.00%	12	100.00%	12
09e	0	.00%	12	100.00%	12
09f	0	.00%	12	100.00%	12
09g	0	.00%	12	100.00%	12
09h	0	.00%	12	100.00%	12
09i	0	.00%	12	100.00%	12
09j	0	.00%	12	100.00%	12
09k	0	.00%	12	100.00%	12
09l$1	0	.00%	12	100.00%	12
09l$2	0	.00%	12	100.00%	12
09m$1	0	.00%	12	100.00%	12
09m$2	0	.00%	12	100.00%	12

Survey Software by ÆXSystems(tm) and The Institute for Public Policy and Business Research, The University of Kansas.

Figure: Exec Response Density Statistics report, First Page.

This report may be several pages long. For illustration purpose, only two pages are displayed in this manual.

Executive Summary of Question Response Density Statistics

Question ID	Responses	Percent Responses	Non Responses	% Non Responses	Respondents Surveyed
10a$$Future06sa	5	41.67%	7	58.33%	12
10b$$Future06sb	2	16.67%	10	83.33%	12
11a$$Unskilled07sa	5	41.67%	7	58.33%	12
11b$$SemiSkill07sb	5	41.67%	7	58.33%	12
11c$$Skilled07sc	5	41.67%	7	58.33%	12
11d$$Super07sd	5	41.67%	7	58.33%	12
11e$$Degreed07se	5	41.67%	7	58.33%	12
12I$$$Recruit08s	5	41.67%	7	58.33%	12
12j$$Other08sj	0	.00%	12	100.00%	12
13a$$Employees09$a	4	33.33%	8	66.67%	12
13b$$Employees09$b	4	33.33%	8	66.67%	12
14I$$RawMaterials	3	25.00%	9	75.00%	12
15I$$List	0	.00%	12	100.00%	12
16I$$YearsHere	1	8.33%	11	91.67%	12
17I$$Locate10s	3	25.00%	9	75.00%	12
17I$$Other10s	0	.00%	12	100.00%	12
18a$$Move11sa	3	25.00%	9	75.00%	12
19I$$1MoveClose12s	2	16.67%	10	83.33%	12
19I$$2Other12s	0	.00%	12	100.00%	12
20I	2	16.67%	10	83.33%	12
21a	2	16.67%	10	83.33%	12
21b	2	16.67%	10	83.33%	12
22I$$Part13	3	25.00%	9	75.00%	12
22b$$Footage13sb	1	8.33%	11	91.67%	12
23a$1Expend14sa$1	2	16.67%	10	83.33%	12
23b$2Other14sb$2	0	.00%	12	100.00%	12
24I$$Physical15s	3	25.00%	9	75.00%	12
25I$$Expan16s	3	25.00%	9	75.00%	12
26a$aWhere17sa	2	16.67%	10	83.33%	12
26b$$Why17sb	1	8.33%	11	91.67%	12
26c$$Other17sc	0	.00%	12	100.00%	12
27a$$Outside18sa	2	16.67%	10	83.33%	12
27b$$Outside18sb	3	25.00%	9	75.00%	12
27c$$OtherLeave18sc	0	.00%	12	100.00%	12
28a	2	16.67%	10	83.33%	12
28b$$Prob	1	8.33%	11	91.67%	12
29I	3	25.00%	9	75.00%	12
29I$$Other	0	.00%	12	100.00%	12
30a$$Financing19sa	2	16.67%	10	83.33%	12
30b$$Fin19sb	3	25.00%	9	75.00%	12
30b$$Other19sb	0	.00%	12	100.00%	12
31a$$LocalFin20sa	2	16.67%	10	83.33%	12
31b$$Elaborate20sb	0	.00%	12	100.00%	12

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Figure: Second page of Exec. Response Density Statistics report

The "Print Data Recap" button prepares a summary report of questions and entered responses. Unlike the Executive Summary report, the Data Recap report displays the question text, the data caption and the responses summarized in a table of frequencies and percentages, sorted by the answer value.

Survey ID Code: ALongPractice

Survey Description: A Practice Version of Kansas BusinessFirst Long Survey.

06a$$StartWage04a — **What is the average starting hourly wage paid to non-salary employees?**

Average Starting Wage	Reported	Percent
0	7	58.33%
5.25	1	8.33%
5.55	1	8.33%
5.66	1	8.33%
6.5	2	16.67%
	12	

06b$$Benefits04b — **Do you have a benefits package for your employees?**

Have Benefits	Reported	Percent
Not Answered	7	58.33%
Yes	4	33.33%
No	1	8.33%
	12	

06c$$Benefits04c — **If Yes, what does it include?**

Benefits Offered	Reported	Percent
Not Answered	8	66.67%
Health Insurance	3	25.00%
Dental Insurance	4	33.33%
Retirement plan	1	8.33%
Vacation leave	4	33.33%
Sick leave	3	25.00%
Profit sharing	3	25.00%
Life insurance	1	8.33%
Flextime	1	8.33%

Survey Software by ÆXSystems(tm) and The Institute for Public Policy and Business Research, The University of Kansas.

Saturday, September 27, 1997 *Page 5 of 40*

Figure: Data Recap Report

Further Analysis: Exporting data. – The system is capable of exporting data as Comma Separated Variables (CSV) files. This format is suitable for direct input to Excel, SPSS, and other programs. To launch the Data Form click on the "**A5: Data Analysis**" tab of the Main Control Panel, then click on the "**Special Data Export**" button.

This form allows the selection from various canned "Inclusion sets" that export some or all of the data. The "Test" inclusion set allows the user to select any combination desired. Others are "Locked" from modification. Once options are set, click on the "**Excel CSV (Comma Separated Variables) Export**" button. A file dialogue box will request the destination output filename to be written. The process takes some time to run. A status Form is displayed during the export.

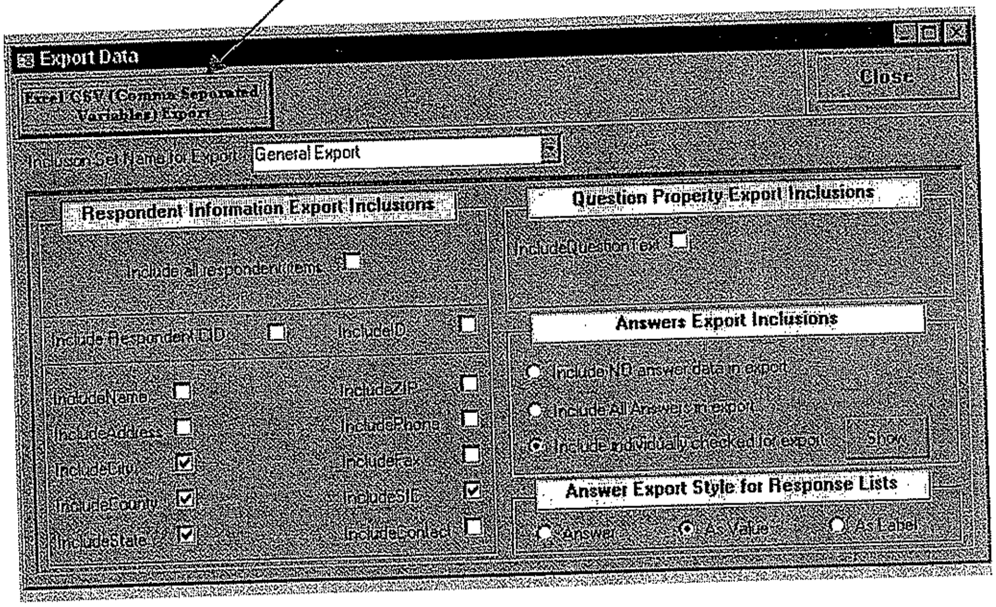


Figure: Export Data Dialogue Box

All text and numeric answers are exported as they are kept in the database.

Single answer *(only one answer applies)* multiple-choice answers can be exported in three formats. 1) as the "Bullet" id on the survey form; 2) as a numeric value from 0 to *n* (or 1 to *n*) according the way the question is posed and the answer expected, and, *n* is the number if possible responses in the multiple choice list; or 3) as the "Text" describing the answer as shown on the survey form.

For "*(Check all that apply)*" style multiple-choice answers, the variable is exported as an "array" with the variable name followed by a numeric index number. The number is assigned typically form 0 to *n* where *n* is the number if items in the possible answer list. The first item (item 0 is the first item in this array) is set to the numeric valued of zero (0), if no other items in the list were checked, otherwise it is set to one (1). The remaining items numbered from 1 to *n* contain a 0 if they were not checked, or a one (1) if they were checked.

The first record of the "CSV" file contains the list of data items (variable names) exported. To get a list of variables exported, from the "LOGO" tab of the Main Control Panel, click on the "Advanced Features" Button. Then, clicking either of the buttons labeled "Questions Pool Report" or "Survey References to Questions Report, will produce a report with the variables exported.

The "Question Pool Report" contains the Export Name, and the data type with all answers of multiple choice questions.

The "Survey Reference s to Questions Report" will not show the multiple choice answers, but shows which questions are contained in which surveys. Both reports contain the Export Name.

The SITE "Local Issues" questions will be included in all reports.

The "View Answer Data as a Data Sheet" button provides the answer data in a spreadsheet within the program. This format is not a column by column of answers, it is a full "dump" of all question and answers with answers placed in row by row format. This is because most spreadsheets only accommodate up to 255 columns. This format will produce a row for each answer of each respondent for a survey. Analysis of answers can also be accomplished with the data export (CSV output).

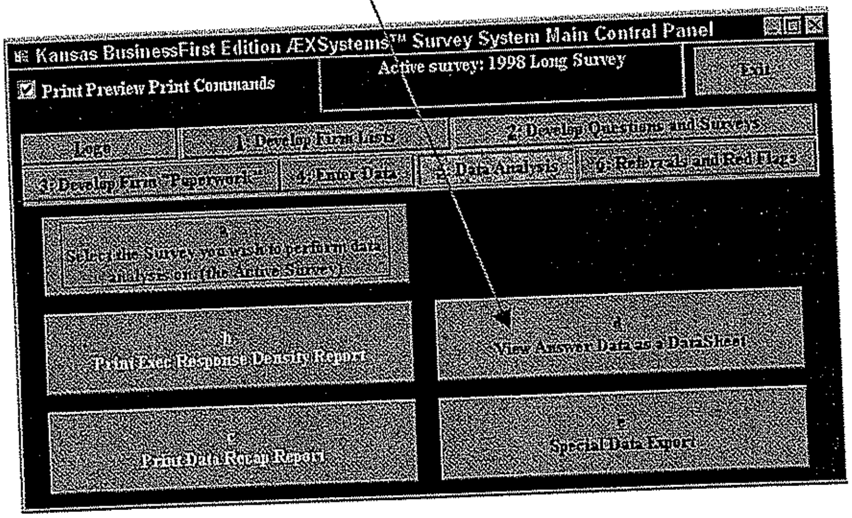


Figure: Main Control Panel Tab 5: Data analysis.

Phase VI

Correspondence Between the Site, the Respondent and the Agencies

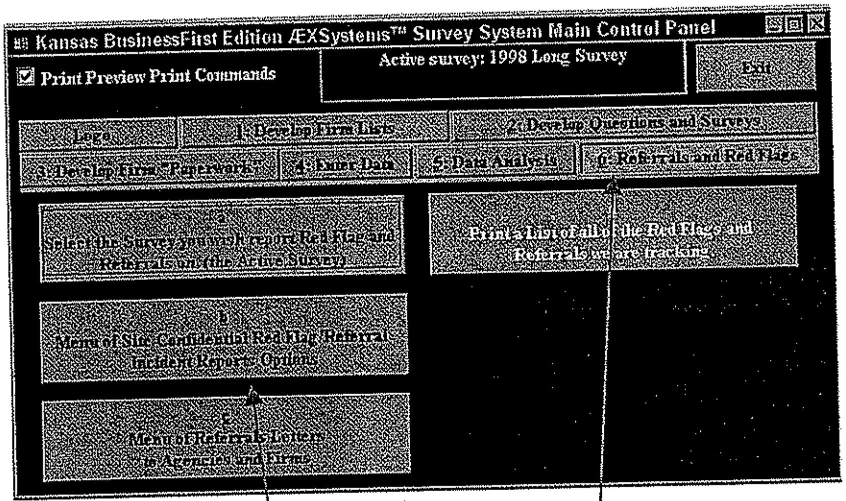


Figure: Main Control Panel Tab 6: Referrals and Red Flags.

Prepare Exceptions Reports. This process will allow the user to prepare survey reports of all survey exceptions or customized reports of specific exceptions for specific respondents or referral agencies.

To run the exception listing , click on the "6: Referrals and Red-Flags" Tab of the Main Control Panel then click on the button labeled "Menu of Site Confidential Red-Flag/Referrals Report Options".

The listing can be sorted by notification group (referral agency) and then by the respondent or vice versa. This provides the option of seeing all exceptions for a respondent listed together or all exceptions referred to a particular referral agency listed together.

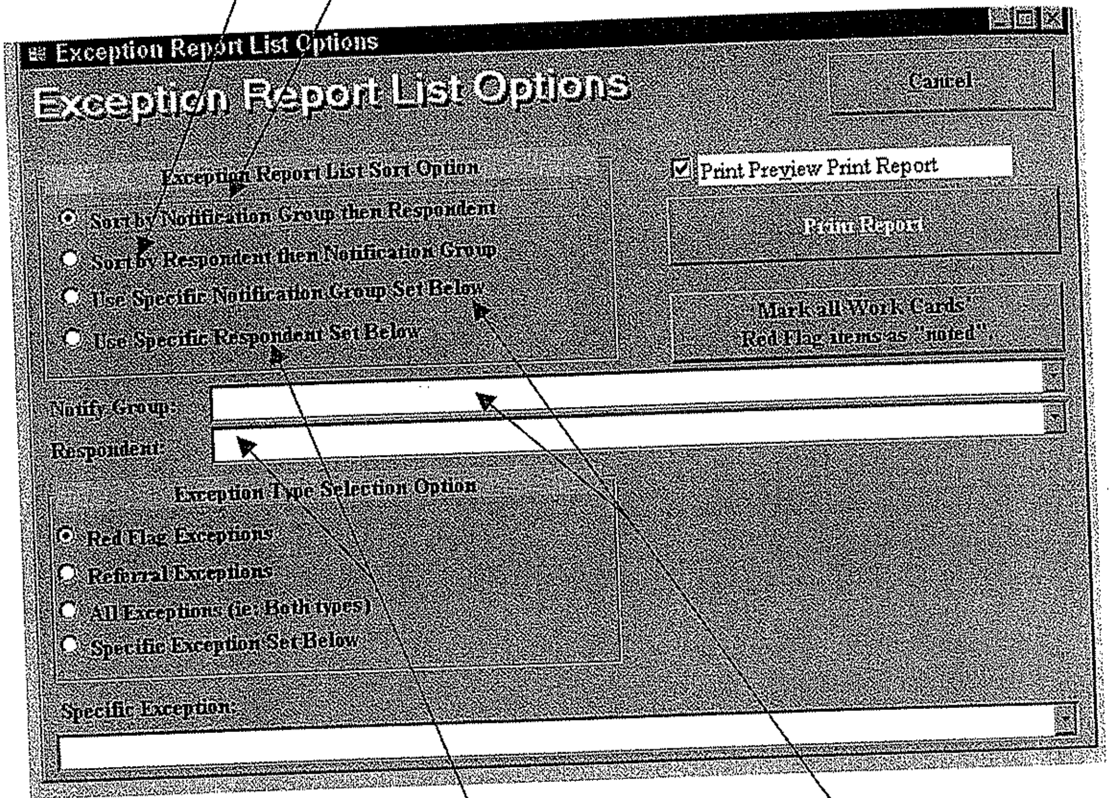


Figure: Exception Report List Options Form.

The user may also specify either particular respondents or referral agencies by using pull-down menus.

Select the type of exceptions to report – Red Flags, Referrals, both Red Flags and Referrals, or a specific set of exceptions. The user may preview the report before printing to ensure that it's content options produce desired results.

The "referrals letters" reports are accessed first from the main control panel clicking first on the 6: Referrals and Red Flags tab and then click on the button labeled "Menu of Referrals Letters to Agencies and Firms"

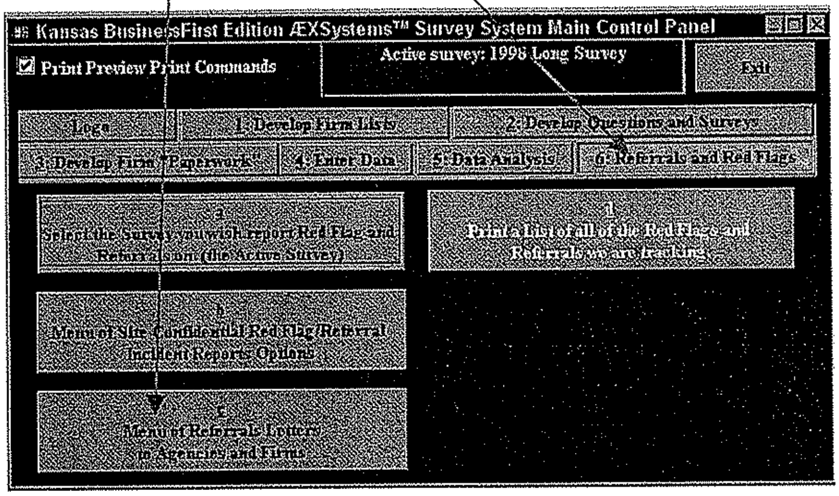


Figure: Main Control Panel Tab 6: Referrals and Red Flags.

The "Notifications Letters Options form appears. Select the report to run or select to Mark the Work Cards that Referrals to agencies has occurred by clicking on the "Mark Referrals as Reported to Agency on Workcards" button.

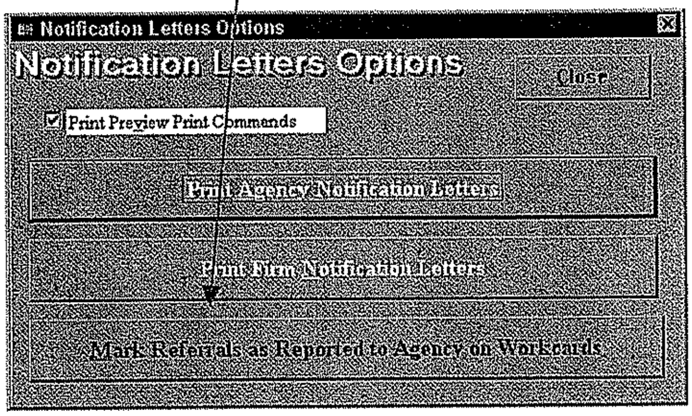
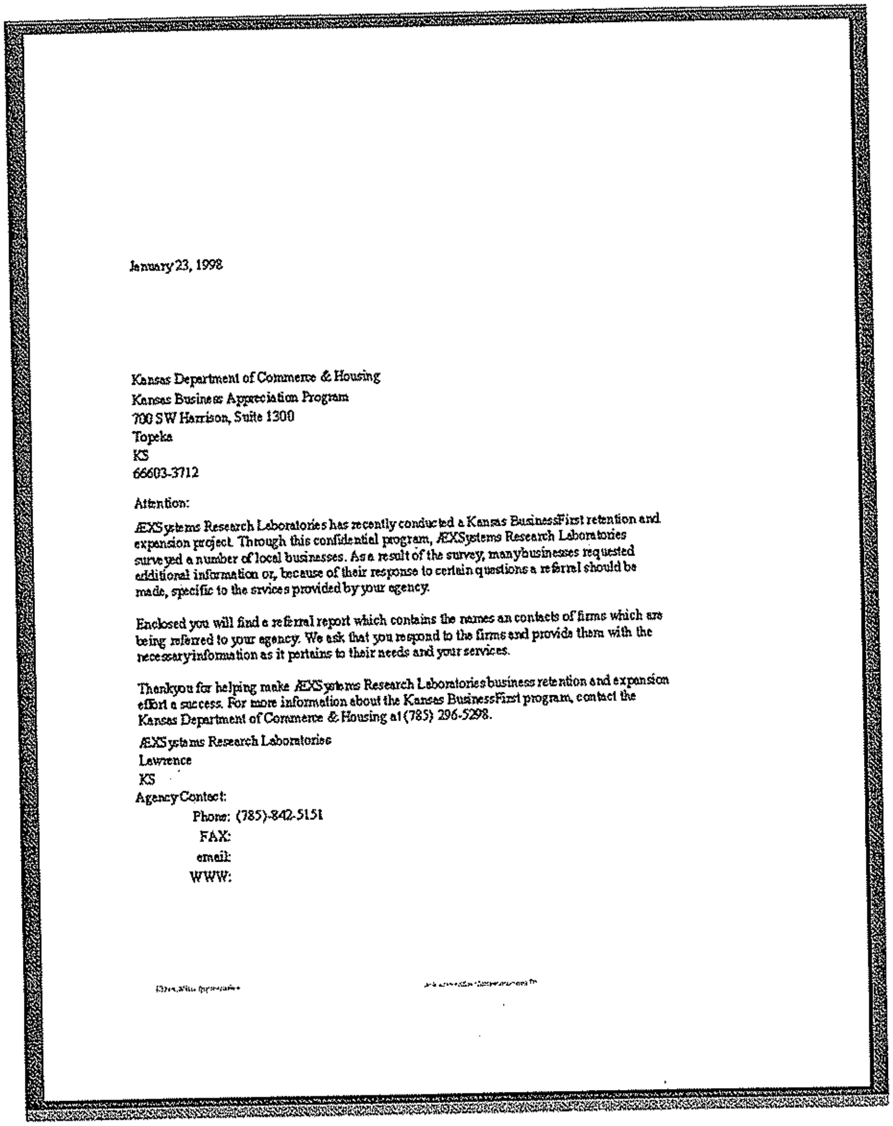


Figure: Notification Letters Options Form.

"Notification Letter Options" For every firm that elected to have "referrals", the three options will be processed. First, it will print all notifications to agencies that firms need their help according to the rules defined for referral exceptions. Second, it will print a letter to each respondent indicating the agency was notified. Third, it post a date to each Work Card indicating the referral was made.

Samples of these reports and letters follow.



January 23, 1998

Kansas Department of Commerce & Housing
Kansas Business Appreciation Program
700 SW Harrison, Suite 1300
Topeka
KS
66603-3712

Attention:

ÆXSystems Research Laboratories has recently conducted a Kansas BusinessFirst retention and expansion project. Through this confidential program, ÆXSystems Research Laboratories surveyed a number of local businesses. As a result of the survey, manybusinesses requested additional information or, because of their response to certain questions a referral should be made, specific to the srvices provided by your agency.

Enclosed you will find a referral report which contains the names an contacts of firms which are being referred to your agency. We ask that you respond to the firms and provide them with the necessaryinformation as it pertains to their needs and your services.

Thankyou for helping make ÆXSystems Research Laboratories business retention and expansion effort a success. For more information about the Kansas BusinessFirst program, contact the Kansas Department of Commerce & Housing at (785) 296-5298.

ÆXSystems Research Laboratories
Lawrence
KS
Agency Contact:
Phone: (785)-842-5151
FAX:
email:
WWW:

Figure: Sample of Letter notifying an agency of detected referrals.

Note: The information contained herein is Confidential. It is not for public perusal or publication. It is provided to you and your agency in hopes that your agency can give aid, advice and assistance to the indicated firms.

RespondentId Mr. Johnson
Name
Phone
PhoneFAX
PhoneOther
Email
WWW
Contact:
Title

Reasons indicated by firm for this notification

Having trouble getting semi-skilled workers.
Having trouble getting skilled workers.
Recruiting problem: High cost of training emplyees
Lack of adequate skilled labor.

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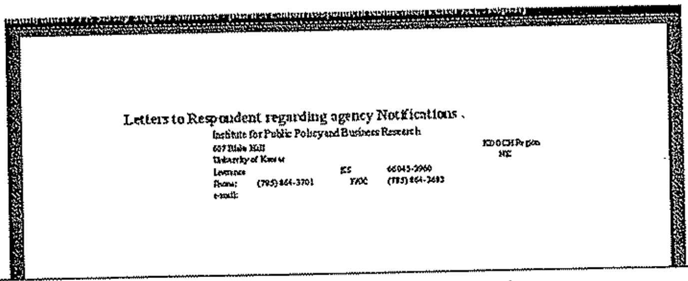
KDOCHOfWorkforceTraining *nelawrencedouglasinstitutepublicpolicyandbusiner*

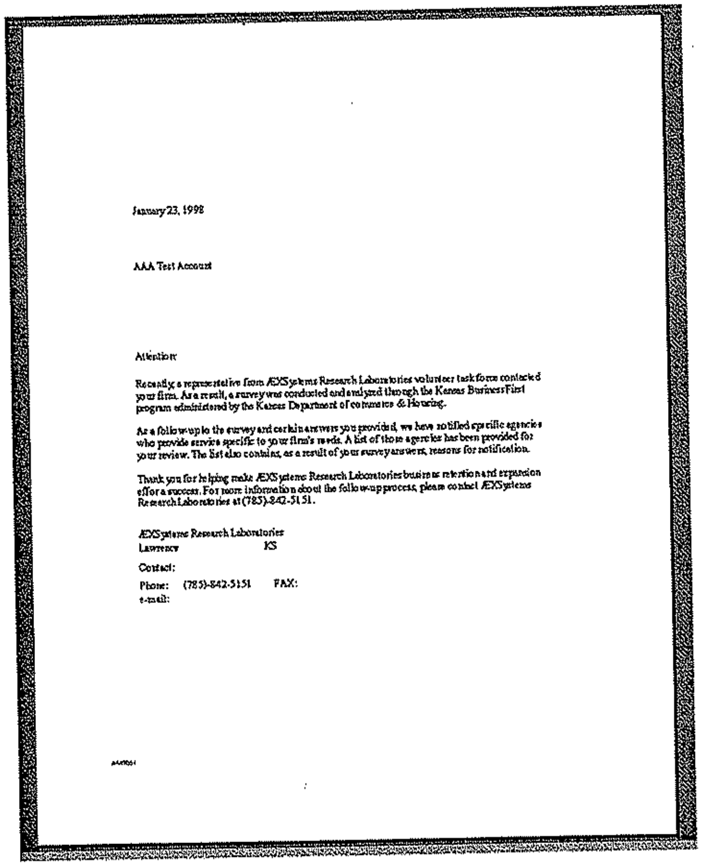
Figure: Sample of Referral Exceptions reported to Agency



Letters to Respondent regarding agency Notifications .

Institute for Public Policy and Business Research
607 Blake Hall
University of Kansas
Lawrence KS 66045-2960
Phone: (785) 864-3701 FAX (785) 864-3683
e-mail:

Figure: First Page of Respondent Letters.



January 23, 1998

AAA Test Account

Attention:

Recently, a representative from ÆXSystems Research Laboratories volunteer task force contacted your firm. As a result, a survey was conducted and analyzed through the Kansas BusinessFirst program administered by the Kansas Department of commerce & Housing.

As a follow-up to the survey and certain answers you provided, we have notified specific agencies who provide service specific to your firm's needs. A list of those agencies has been provided for your review. The list also contains, as a result of your survey answers, reasons for notification.

Thank you for helping make ÆXSystems Research Laboratories business retention and expansion effort a success. For more information about the follow-up process, please contact ÆXSystems Research Laboratories at (785)-842-5151.

ÆXSystems Research Laboratories
Lawrence KS
Contact:
Phone: (785)-842-5151 FAX:
e-mail:

Figure: Respondent Letter and Agency Introduction

Phase VII
Correspondence between the Site the KDOC&H

At some point in time, the "survey" is "complete". This means all of the "anticipated" Respondents have returned the survey, the data has been entered, and all local Site work is "done".

It is recommended that the local site develop a follow-up strategy that includes this feature. (See the *KANSAS BusinessFirst* Self-Guided Manual for further information on developing a follow-up strategy.)

KDOC&H Follow-up. When the local user receives the *KANSAS BusinessFirst* software from KDOC&H, the user agrees to send survey results to KDOC&H for incorporation into a state business retention and expansion database. It is recommended that this report be generated after final data entry.

Backing Up the data to send to KDOC&H

At this point in the process, a transmittal of the database needs to be made to KDOC&H. To perform this under Windows 95, make sure you are totally logged out of the system, and it is NOT running.

From the "Start" menu on the Windows95 desktop, select "Programs", then, "Kansas BusinessFirst Menu," then, "Compact the Database."

This will compact the database so that the "least" amount of needed space is taken, thus, perhaps, requiring few floppy disks to complete the backup.

This process takes a few moments, so be patient.

After the "compaction" is complete, from the "Start" menu on the Windows95 desktop, select, "Programs", then, "Accessories", then, "System Tools," then, finally, "Backup".

Again…Start, Programs, Accessories, System Tools, Backup.

When the program launches, a form that instructs you how to "operate" it will appear. Follow the directions, clicking the "Ok" button until the form shows the computer as a hierarchical tree with all of the available drives showing.

Select the drive and directory where you installed the Survey system software. If you used the recommended directory, it is:

C:\Program Files\Kansas BusinessFirst Survey Software

If you placed the "installation" somewhere else, then you must locate it on the directory structure presented on the Backup utility's form.

After locating the directory, check only the B1stdata.mdb file. For about every "megabyte" in size the file is, you will need one (1) floppy disk. The program will ask you to place each "next" diskette in the floppy drive, as they are needed.

Phase VIII

System Maintenance

1. **Deleting unwanted surveys from the system.** If the user deletes a survey, all reports (Referral and Red Flag) and Work Cards that go with the survey are deleted. The Cover Sheets are NOT deleted. However, deleting a Respondent entry will delete the Cover Sheet.

To delete all information about a specific survey, from the Main Control Panel, click on the "2: Develop Questions and Surveys" tab. Next, click on the "Maintain Survey Profile of Descriptive Information" button. Find the survey you wish to delete. Click on the "record selector"

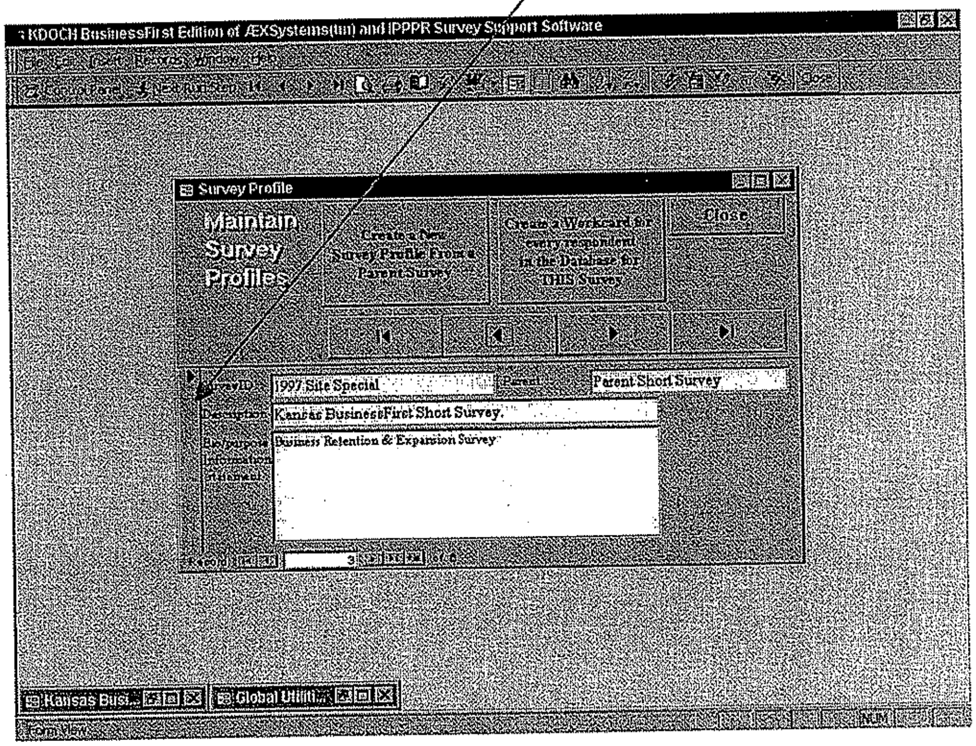


Figure: Maintain Survey Profiles form.

The record selector will become "reversed" in appearance. Press the "Delete" key on the keyboard to delete the entry.

A warning will be issued. If you choose to continue with the delete, then, all answers, work cards, and other records relating to the survey will be deleted.

Section V: Advanced Features of the Program

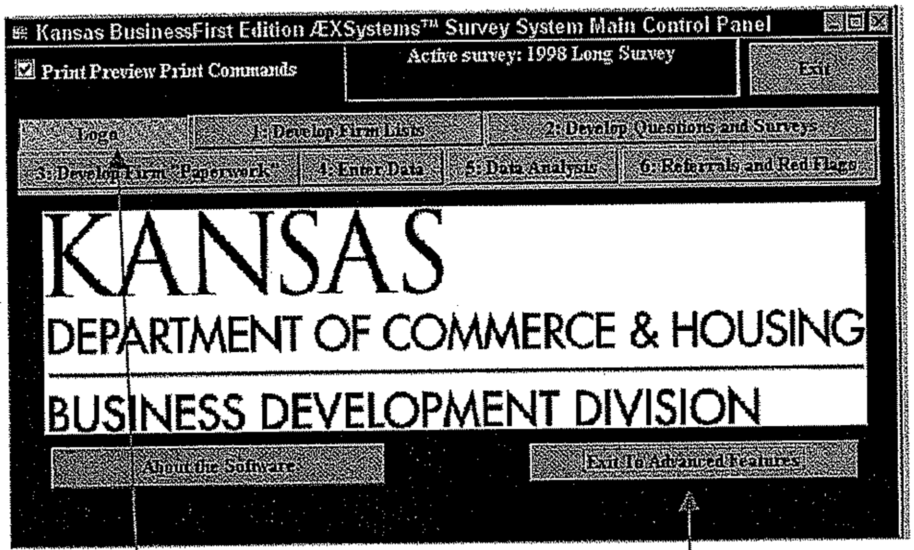


Figure: Kansas BusinessFirst™ Main Control Panel Dialog Box

On the "Logo" tab is a button labeled "Exit to Advanced Features". For certain procedures, this button is used to launch a control panel that has functions that are not needed for normal conduct of the survey. The reports are described on the following pages, followed by the two other tools (the blue buttons.

The "Print Question Pool Report" button produces a report of all questions contained in the in the database, including any site-specific questions.

The report displays the QuestionID, the question text, caption text, export options, answer-data-type, and whether or not the question is active. The report is a useful way to review information that controls how the program behaves that is stored as part of the question pool for each individual question.

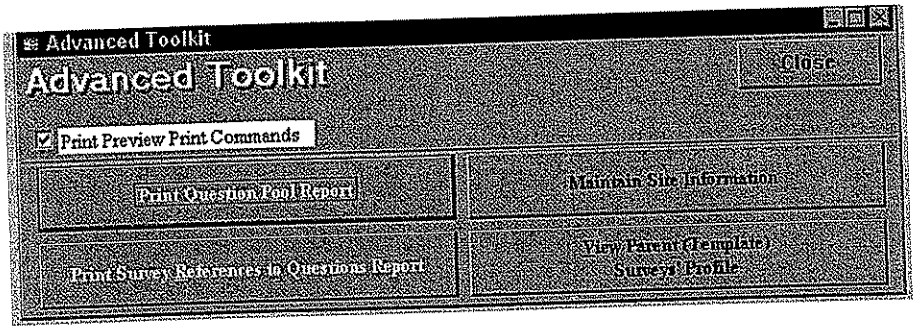


Figure: Advanced Toolkit Control Panel.

The "Print Survey References to Questions Report" button produces the "Survey Reference s to Questions Report". Although the report doesn't display the multiple-choice answers, it does show which questions are contained in which surveys.

This report allows easy review of question text, numbering, and export name on all surveys taken by the site. This report shows whether or not each question will appear on the paper survey print out and/or the data entry forms.

As the site creates secondary and tertiary surveys, some questions may be asked again, while others may be deleted. After several surveys have been taken, this report will identify which questions were asked in each survey so that comparative analysis can take place. Or, in the case of not "overdoing" it, the site can eliminate redundant questions that need not be asked more than once.

The "Maintain Site Information" button launches the Site Maintenance form. This form contains the site name and address. It is important that the information contained on this form is correct, as it will appear in various reports and correspondence materials prepared by the program.

Note: The SiteSerialNumber is currently "locked" and should be left blank.

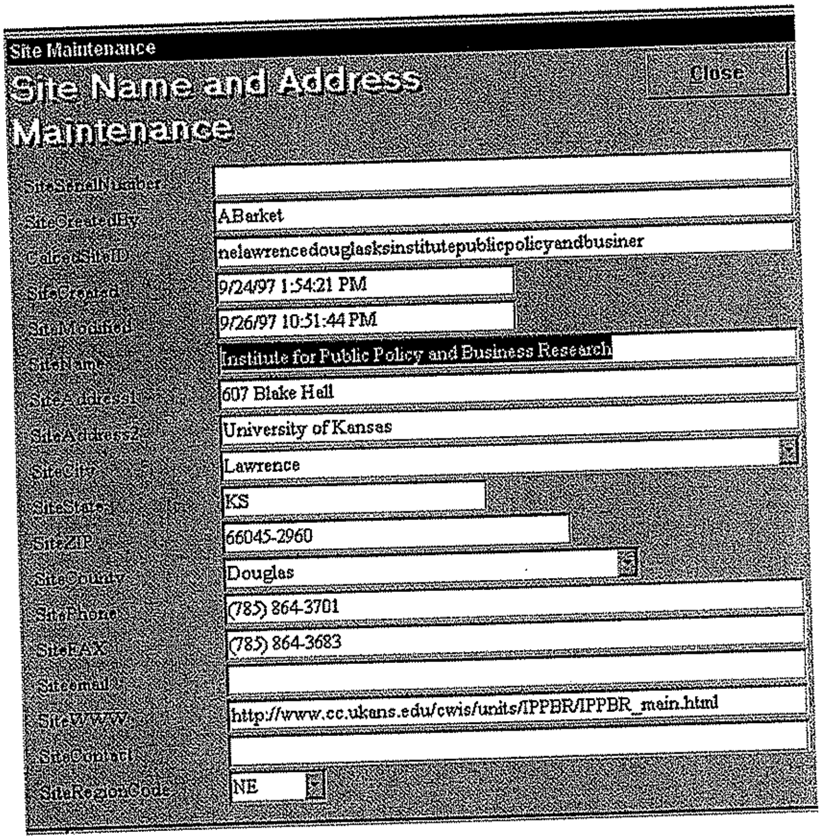


Figure: Site Name and Address Maintenance.

The site information will be used to eventually update your site with KDOC&H.If you reinstall the software, the CalcedSiteID might change. It is based upon the City, the County, and the State, and most important, the Name of the Site. Until KDOC&H receives the end of survey database transmittal, (See: Backing Up the data to send to KDOC&H) software updates issues by the KDOC&H will not be available. If it is unavoidable (due to the change in the site "Name", "City", "County"), then notify the KDOC&H of the changes. They can "synchronize" your old records with the new "ID" for future data backup and exports to the KDOC&H.

"View Parent (Template) Surveys' Profile" button leads to the **View Parent Survey Profiles** form, displaying the Survey ID name, a Description, and the Bio/Purpose Information Statement for that survey. The information displayed cannot be edited. The arrow keys allow the user to move between profiles of existing surveys; initially, the software will arrive on site containing only two Parent surveys, and thus two survey profiles will be listed.

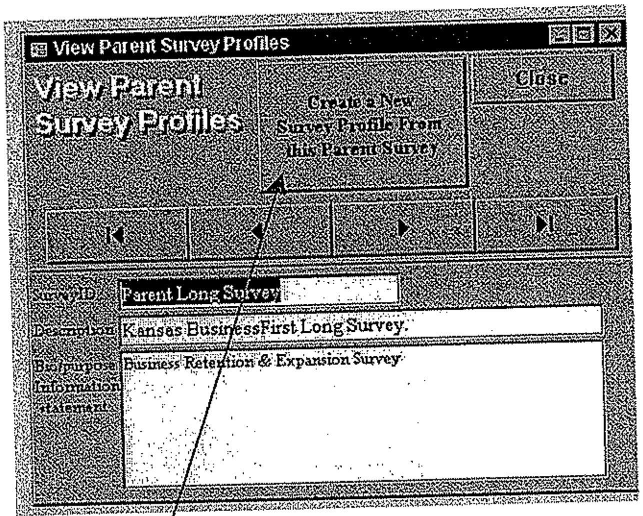


Figure: View Parent Survey Profiles form.

The "Create a New Survey Profile from this Parent Survey" button is a major feature of this form, allowing the user to create new surveys. After selecting this button, the Create a New Survey form appears. The user will enter the new survey ID; select a parent survey on which to base the new survey; and, optionally, append the "active" site-specific questions to the new survey (by checking the option box that controls the creation process).

The procedure for survey creation is describe in Section IV, Phase II of this manual.

APPENDIX A: Business Retention and Expansion Community Advisory Group

Dennis Arnold, Director of Economic Development, Linn County, Mound City

Don Ballek, Field Representative, KDOC&H, Hays

Alexander Barket, Research Associate and Computer Software Programmer, Economic Modeling Group, IPPBR, the University of Kansas, Lawrence

Clare Gustin, Regional Director, FHSU Small Business Development Center, Hays

Shirley Hanson, President, Independence Chamber of Commerce, Independence

Kent Heerman, Executive Director, Regional Development Association of East Central Kansas, Emporia

Randy Hrabe, Executive Director, Northwest Kansas Economic Development District, Hill City

Jon Hotaling, Director, Coffey County Economic Development, Burlington

Jim Janousek, Research Analyst, KDOC&H, Topeka

Konni Kelly, Business Development Representative, KDOC&H, Topeka

David Lewis, Southern Kansas Telephone, Clearwater

Carol Meyer, President, Garden City Area Chamber of Commerce, Garden City

Genna Ott, Assistant Director, KCCED, the University of Kansas, Lawrence

Beth Tatarko, Assistant Director, KCCED, Kansas State University, Manhattan

Index