Automating the Reporting of Survey Data

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Slides available at http://works.bepress.com/lldlong
Overview

- Background
- Automated Reporting
- Using MS Office for Automated Reporting
- Applications and Limitations
Background

- Was tasked with producing summary reports for 24 fraternity/sorority chapters.
- Thought there must be a way to produce individualized reports in an efficient manner.
- Decided to create one template in MS Word and then mailmerge the survey results into the template in order to produce the 24 reports.
Automated Reporting

Using technology to automate the dissemination of results
Automated Reporting with OFFICE

Requirements:

- Basic understanding of MS WORD or MS PUBLISHER
- Attention to detail
- Aggregated data source (EXCEL, ACCESS)
Automated Reporting with OFFICE

Key Concepts:

- Mail merge
- Field codes
- Merge fields
- Formula fields
- IF fields
Field Codes

Field codes – placeholders for information
{Page} {=2 + 3}

Viewing fields
- Press Alt+F9, or
- Right-click a field and select “Toggle Field Codes”

Inserting fields – type Ctrl+F9
Merge Fields

{MERGEFIELD Variable Name}

{MERGEFIELD hall}

{MERGEFIELD gender}
Formula Fields

Allow users to perform calculations.

\{= 2 + 3\}

More than \{= \left\{\text{MERGEFIELD q10\_pin\_4}\right\} + \left\{\text{MERGEFIELD q10\_pin\_5}\right\}\}%

More than \{= 25 + 20\} displays as: More than 45%
Formula Fields

About 81% of the respondents agreed their staff person made an effort to get to know them.
IF Fields

Allow users to display content when specific conditions are met

{ IF Expression1 Operator Expression2 “True-Text” “False-Text” }

{ IF { MERGEFIELD gender } = 1 “Male” “Female” }
IF Fields

No AND/OR functions; use nested IF fields for multiple comparisons.

Sample syntax for 3 comparisons:

```plaintext
{ IF { MERGEFIELD q49a_mean } >= 5.50 "➕"
  "{ IF { MERGEFIELD q49a_mean } < 5.00 "❌"
    "▲" }" } }
```
# IF Fields

To what degree does each of the following restrain or inhibit successful recruitment in your chapter?

<table>
<thead>
<tr>
<th></th>
<th>Not at All</th>
<th>To a Slight Extent</th>
<th>To a Moderate Extent</th>
<th>To a Great Extent</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>N</strong></td>
<td><strong>Percentages</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chapter financial dues</td>
<td>45</td>
<td>31.1</td>
<td>44.4</td>
<td>20.0</td>
</tr>
<tr>
<td>Chapter’s recruitment plan</td>
<td>45</td>
<td>53.3</td>
<td>28.9</td>
<td>11.1</td>
</tr>
<tr>
<td>Member participation</td>
<td>44</td>
<td>40.9</td>
<td>38.6</td>
<td>13.6</td>
</tr>
<tr>
<td>Other opportunities on campus</td>
<td>45</td>
<td>42.2</td>
<td>28.9</td>
<td>22.2</td>
</tr>
<tr>
<td>Publicity</td>
<td>45</td>
<td>31.1</td>
<td>31.1</td>
<td>24.4</td>
</tr>
<tr>
<td>Stereotypes</td>
<td>44</td>
<td>22.7</td>
<td>36.4</td>
<td>31.8</td>
</tr>
<tr>
<td>The chapter house</td>
<td>45</td>
<td>26.7</td>
<td>46.7</td>
<td>22.2</td>
</tr>
<tr>
<td>Time commitment</td>
<td>45</td>
<td>26.7</td>
<td>37.8</td>
<td>26.7</td>
</tr>
</tbody>
</table>

↑ Your chapter is above the mean for your council (The listed item is less of a problem for your chapter)

↓ Your chapter is below the mean for your council (The listed item is more of a problem for your chapter)

⇒ Your chapter is at the mean for your council
Field Switches

Allow users to change the way data are displayed. Use \# after the variable name.

Example: 

```
{MERGEFIELD q10_pin_4 \# 0 }
```

How data is displayed:

- `8.456 \# 0` displays as: 8
- `8.456 \# 0.0` displays as: 8.5
Putting It All Together

Use mail merge feature in MS WORD to produce reports