Exercise: Prospecting Query

Goal

This query was suggested by Admissions as a fairly complex but not atypical prospecting query in terms of its basic structure. It uses the limiting procedure as well as the Prospect Contact flattening technique described in the manual.

The goal is to obtain a flattened (one row per employee ID) list of prospects containing contact information for mailing (address, telephone, e-mail, and name). Two groups of prospects should be combined to make the final list. Use the following criteria:

For Both Groups

- ✯ Academic Career = Undergrad
- ✯ Admit Term = Fall 2008
- ✯ Region = All New York State
- ✯ Ethnicity = Asian
- ✯ Referral Source = Tests
- ✯ SAT I Verbal > or = 700 (high scores only)
- ✯ SAT I Math > or = 700 (high scores only)

Group A

- ✯ Academic Program listed but NOT= Arts (i.e., = AAP, CALS, ENGR, Hotel, HumEc, or ILR). Do not include prospects who do not have a program listed.

Group B

- ✯ Academic Interest = Pre-Law, Business, or Government

Procedure

Prepare the Limits/Filters For Both Groups

1. The first three general criteria are selected on the Query Limits tab. Select them and then process the queries necessary (in this example, Prospecting, Prospect Contact, Test Scores, Academic Interests, and Prospect Program/Plan). Since so many need to be run, you may wish to select Process All Queries.

2. In the filtered Prospecting results set, filter by ethnicity and referral source.

3. In the filtered Test Scores results set, filter by High Score, Test Description, and Test

Component.

4. If your filtered Test Scores results set has a quick filter for test scores, use the dialog box to limit it there. If not, go to the native Test Scores results set. Right-click over the Test Score column and select Limit... to use the Limit dialog box there.

Some of the following steps refer to the suggested techniques described in the "Limiting across Results Sets" section of the Dashboard 2 manual. For detailed instructions, please consult that document.

5. The Test Scores data is the final result of the accumulation of limits and filters chosen so far. This data now needs to be manually carried into the sets used by groups A and B. To prepare for this, export the Test Scores employee ID list to a tab-delimited .txt file (testscores.txt).

Group A

1. In the filtered Prospect Program/Plan results set, filter by academic program.

   The Limit... dialog box is helpful here. If you use this feature, avoid including blank programs in your criteria by making sure that the Include Nulls checkbox is unchecked.

2. In the native Prospect Program/Plan results set, apply testscores.txt to the Employee ID column using the Limit dialog box.

3. In the native Prospect Program/Plan results set, export the employee ID list to a tab-delimited .txt file (progplan.txt). This data in turn now needs to be manually carried into the Prospect Contacts results set.

4. In the native Prospect Contact results set, apply progplan.txt to the Employee ID column using the Limit dialog box.

5. In the filtered Prospect Contact results set, flatten the set by selecting the appropriate filters (see the special note in "Flattening a Results Set" in the Dashboard 2 manual for more information).

6. Export this set as an Excel file (groupa.xls).

Group B

Remember that query values set in the native area remain active until manually released. Since the same native criteria are applied to both groups in this exercise, it is not necessary to close the Dashboard. *You should always close the Dashboard browser window before running an entirely new query in order to clear all limits and quick filters.*

1. In the filtered Academic Interests results set, filter by academic interest.

2. In the native Academic Interests results set, apply testscores.txt to the Employee ID column using the Limit dialog box.

3. In the native Academic Interests results set, export the employee ID list to a tab-

delimited .txt file (acadint.txt). This data in turn now needs to be manually carried into the Prospect Contacts results set.

4. In the native Prospect Contact results set, apply acadint.txt to the Employee ID column using the Limit dialog box. (This replaces the progplan.txt list applied in the Group A section.)

5. In the filtered Prospect Contact results set, flatten this results set by selecting the appropriate filters (see the special note in "Flattening a Results Set" in the Dashboard 2 manual for more information).

6. Export this set as an Excel file (groupb.xls).

Finalizing the List in Excel

1. Open the two spreadsheets in Microsoft Excel.

2. Select and copy all rows in one of them (say, groupa.xls) and paste into the other.

3. Sort the new, full list by Employee ID (column A).

   You may have duplicates in this list. (It's possible that at least one prospect meeting the common criteria named both a non-Arts program and either Pre-Law, Business, or Government as an academic interest.) The next steps will compare employee IDs to produce a list without doubles.

4. Insert a new column B (call it "Double").

5. In row 2, column B, enter:

   ✯ `=IF(A2=A1,"DOUBLE","")`

6. Position the pointer in the lower right corner; you will see a black cross. Click on, hold, and drag this box down to all remaining rows in column B. Any duplicate employee ID will be marked with "DOUBLE."

7. Select the entire spreadsheet. In the menubar, choose *Data > Filter > Autofilter*.

8. Finally, click on the Autofilter drop-down arrow in column B's header and select "(Blanks)." The "DOUBLE" rows will be hidden and you will see one row per employee ID.