



# Survey Compilation Program Documentation

<http://www.ourhealthcarefuture.org/>

Version: 1.0

Last Modified: 28 March 2006

# **Welcome to the OurHealthareFuture.org survey compilation program.**

## **Introduction**

The Survey Compiling Program was created to provide Dialogue hosts and facilitators with an easy and fairly automatic method of compiling participant preference data and producing charts and worksheets, reflecting those preferences, during the Dialogue process.

## **Requirements**

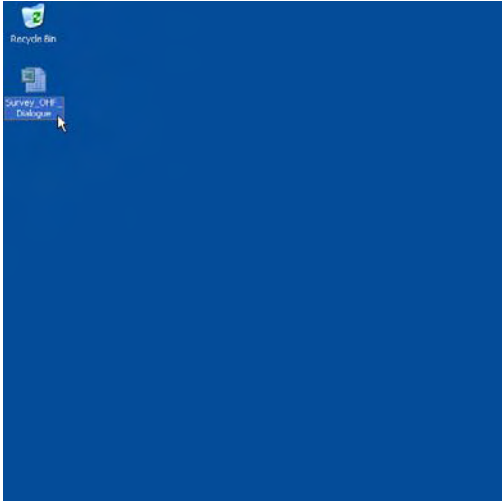
- A computer with Microsoft Windows 2003 or XP
- Microsoft Excel 2003 or XP

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## Preparation

If you do not already have a copy of the Survey Compiling Program on your computers desktop, please first obtain a copy from the [OHF online library](#) or from the OHF design team [via email](#).

Though not necessary, we recommend that you save the program to your desktop for easy access during the Dialogue process.



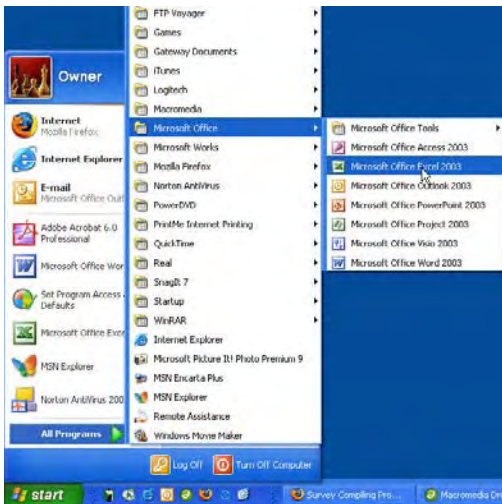
[Click to view larger image](#)

Before running the program, you must set the security settings for Excel to allow *macros* to run (setting "medium" is recommended). Macros, in this case, are small programs, written in a Microsoft language called Visual Basic, that greatly extend Excel's capabilities. To create this program, a number of custom macros were combined with a basic excel spreadsheet to create a sophisticated and powerful computational assistant to those of you hosting and/or facilitating a dialogue. (Before this, facilitators had to calculate by hand and each participant had to draw their own group priorities chart - ugh!) Without enabling these macros to run on your computer, the Survey Compiling program will not work.

However, in an attempt to do due diligence here, we must also explain that macros, because of their power, have traditionally been one of the primary means by which viruses are spread and damage computers. So though this program does not contain a virus and you must enable macros to run in Excel for this program to work, we recommend that you set your security setting to "medium" which means that Excel will prompt you before running any macros. This gives you protection in that you must choose to enable macros *each* time you open any excel file that contains macros, including this one. Further, we encourage those of you who are concerned (or interested)

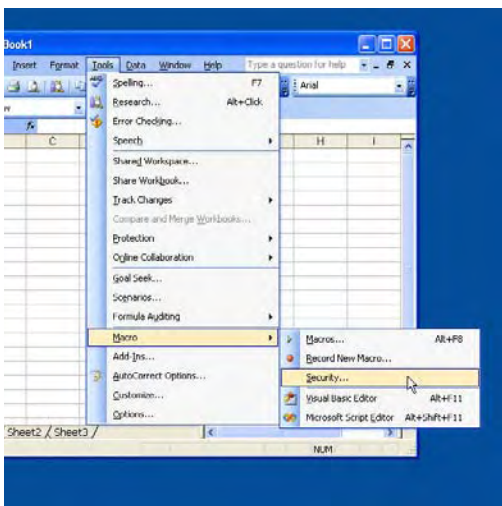
to read more about macro security settings in this [Microsoft article](#). Finally, we strongly recommend (and [provide instructions in this regard](#)) that you return your macro security settings to their highest setting after you have finished running this program.

To set your macro security setting to medium, open Excel (*just Excel, do not open the Survey program at this time.*) by clicking on your Start menu, then browsing to All Programs -> Microsoft Office -> Microsoft Office Excel. (Note: Your specific location may be different.).



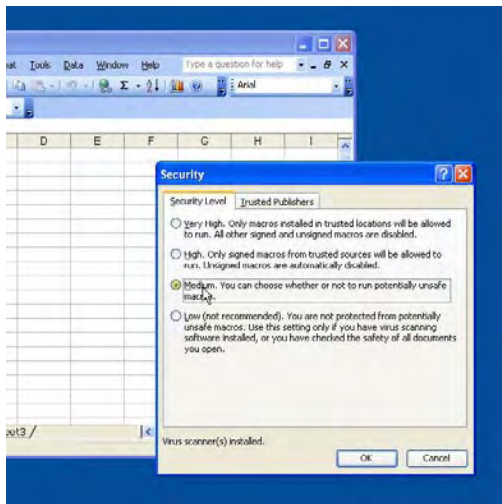
[Click to view larger image](#)

When Excel is open, go to the Tools menu, then browse to Macro -> Security.



[Click to view larger image](#)

When the Security window pops up, select "Medium" from the options provided.



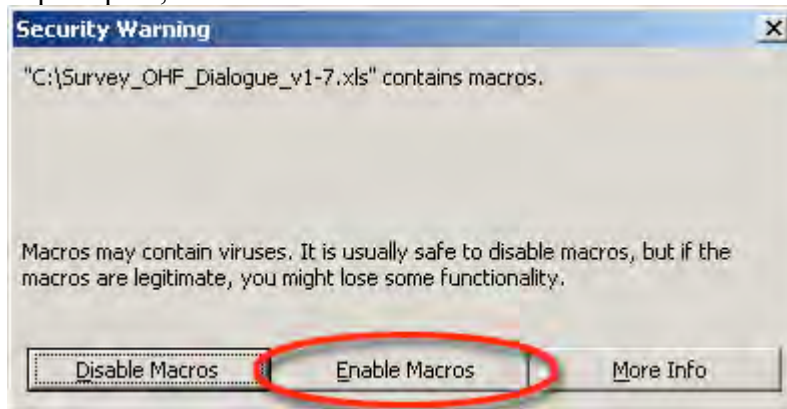
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Then close Excel. You should now be ready to run the program.

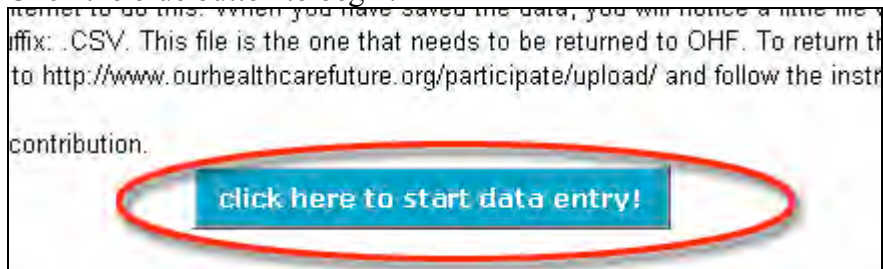
# Using the Compiling Program

## Step 1

- ∞ Open the Excel document by double clicking on it.
- ∞ If prompted, click the **Enable Macros** button.

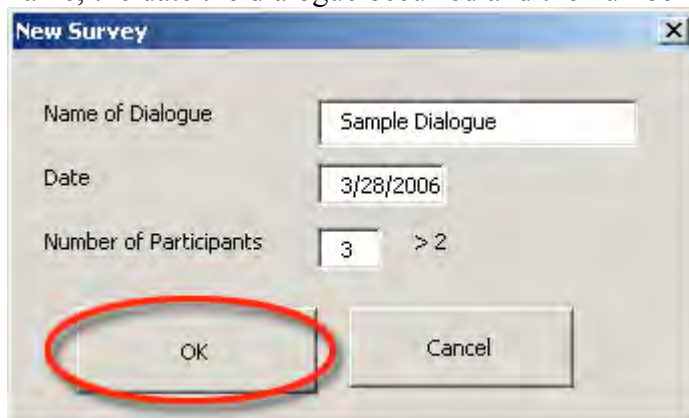


- ∞ Click the blue button to begin.



## Step 2

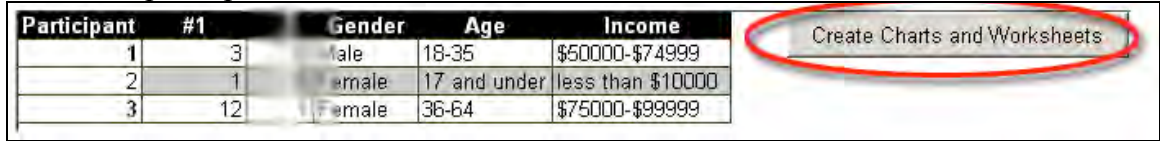
- ∞ Enter your Dialogue information when prompted. You must provide the Dialogue name, the date the dialogue occurred and the number of participants.



### Step 3

- ∞ Fill in the information for all participants. This includes priorities, gender, age and income.
- ∞ When complete, press **Create Charts and Worksheets**.

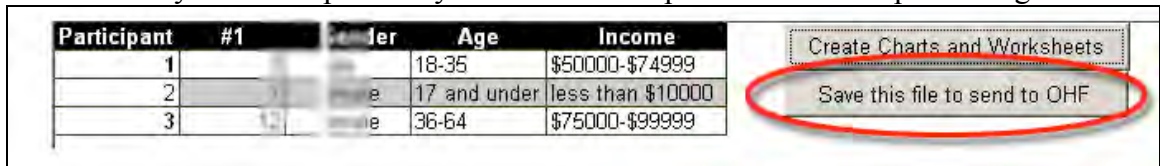
Participant	#1	Gender	Age	Income
1	3	Male	18-35	\$50000-\$74999
2	1	Female	17 and under	less than \$10000
3	12	Female	36-64	\$75000-\$99999



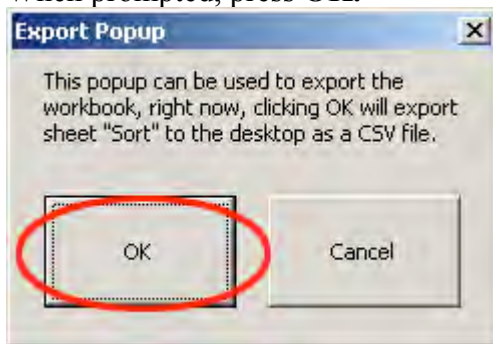
### Step 4

- ∞ Press **Save this file to send to OHF**. This will save a specially formatted document to your desktop which you will need to upload to OHF for processing.

Participant	#1	Gender	Age	Income
1	3	Male	18-35	\$50000-\$74999
2	1	Female	17 and under	less than \$10000
3	12	Female	36-64	\$75000-\$99999

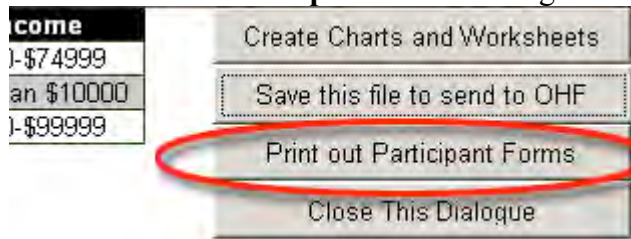


- ∞ When prompted, press **OK**.



## Step 5

- ∞ Press **Print out Participant Forms** to begin the printing process.



- ∞ The *Printing Options* window will appear. Enter the number of copies to print and press **Print**. Optionally you can press **View or change Printer Options** to change the layout or choose a different printer.

