How to Operate the External Survey Database

1. When opening the database, enable the macros to ensure the database will work. (Note: This will appear in a yellow bar under the toolbar in Excel).
2. The first screen will ask if the Common Data Set has been completed.
   a. If selecting “No,” go to step 3.
   b. If selecting “Yes,” go to step 6.
3. The screen will refresh to the Common Data Set menu. Select the section of the survey that needs to be completed (e.g. CDS B: Enrollment and Persistence).
4. Once a section has been selected, the screen will refresh to the question comparison section. This contains the questions, the source to obtain the data, and information needed for completion of the survey section. Once completed, select the “Back to Common Data Set Menu” button.
5. Repeat steps 3-4, until all of the Common Data Set sections are completed or as needed; then select the “External Survey Menu” button at the bottom of the Common Data Set Section menu to return to access other survey information.

6. The screen will refresh with a list of the external surveys the database contains. Select the survey that needs to be completed (e.g. CollegeBoard).

7. After selecting the survey, the screen will refresh to the survey’s section menu. Select the section that needs to be completed.
8. Once the section has been selected, the screen will refresh to display the questions in the section and the source answering the question. After completing the section, select the “Back to CollegeBoard Menu” button.

9. After the completion of CollegeBoard, select the “External Survey Menu” button at the bottom of the CollegeBoard Menu.

10. The screen will refresh to External Survey menu. Repeat steps 7-9, until all of the surveys are completed or as needed.
How to Customize the Database Sources for Your Institution

1. Within the Excel database, the survey questions are contained on the black tabs and begin on the 16th tab of the workbook.

2. On each tab there is an “Action Needed” column. Generally, this is the column that may need to be customized depending on the office’s access to data.