

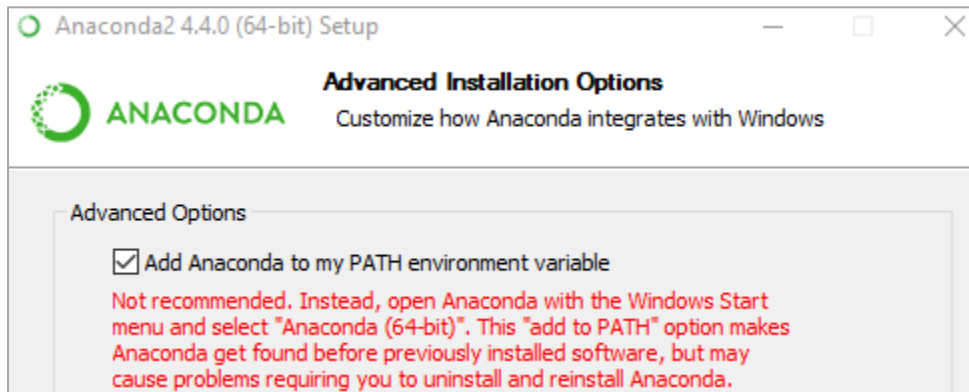
# Instructions for EOPS Custom Reports

**Note:** If anything weird happens that is not detailed in these instructions, alert Xin for troubleshooting

## PROGRAMS TO INSTALL

- **Anaconda**

- <https://conda.io/docs/user-guide/install/index.html#regular-installation>
- Use regular installation
- Make sure to check "Install to PATH" even though it is not recommended



- **Git Bash**


- <https://git-scm.com/downloads>

# QUALTRICS

1. Download EOPS dataset from Qualtrics
  - a. Download as a csv using numeric values

Download Data Table Use Legacy Exporter

CSV TSV XML SPSS User Submitted Files

 Comma separated values

This is a .csv file that can be imported into other programs. Each value in the response is separated by a comma and each response is separated by a newline character. If your responses contain special characters and you will open this export in Microsoft Excel we recommend using the TSV export. Qualtrics CSV exports use UTF-8 encoding, which Excel will not open correctly by default. [Learn More](#)

Download all fields

Use numeric values  
 Use choice text

More Options Close Download

- b. Click on “More Options” and make sure the following options are checked:

Compress data as .zip file

Use commas for decimals

Remove line breaks

Recode seen but unanswered questions as -99

Export viewing order data for randomized surveys

Split multi-value fields into columns

Use internal IDs in header

2. Save data in **End of Program Survey > Custom Reports - EOP > YEAR > Data downloads**
  - a. File **must** be named “**date** EOPS” where **date** is today’s date, written as **MM.DD.YY**
  - b. The date in the dataset’s file name must be the same as day you will run the report writer. If the dataset’s file name or location is wrong, you’ll receive an error message once you run the program
3. **Find and replace all commas with nothing**, then save file
  - a. Re-open the file to make sure it still looks correct, and that the columns didn’t all merge into one. Redo if the columns did get merged.

Find Replace

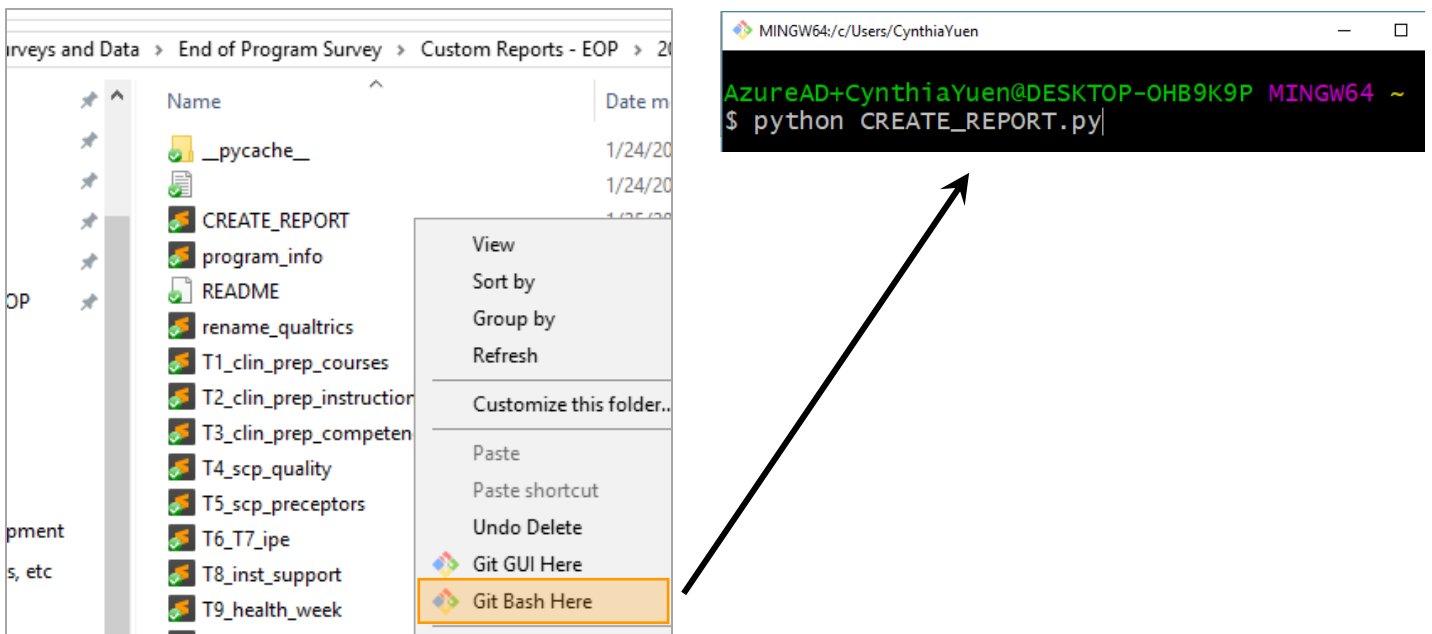
Find what: ,

Replace with: |

4. Create a copy of the dataset (with commas removed) for backup in case you need to rerun the “Create report” program. If rerunning, delete the first dataset, rename the copy to “MM.DD.YY EOPS,” then create a copy of that for your next backup.

## PYTHON

5. **Mac** (At time of writing, Mac did not have Anaconda or Git Bash installed)
  - a. If going through the terminal/bash, run the following exactly: **cd "/Users/username/Dropbox (PAEA)/Surveys and Data/End of Program Survey/Custom Reports - EOP/2018/2018-EOPS-Report-Writer"**
    - i. Note: For 2017, the path ends in **/2017/Report writer**
    - ii. In 2018, Luis created the script for Macs below to begin the program when double-clicking an icon (vs. going through bash)
  1. **cd "/Users/dfrias/Dropbox (PAEA)/Surveys and Data/End of Program Survey/Custom Reports - EOP/2018/2018-EOPS-Report-Writer"; python3 CREATE\_REPORT.py;**
6. **PC**
  - a. Open "Report Writer" folder, right click in the white space of the folder, then select "Git Bash here



7. Run program **CREATE\_REPORT.py**
  - a. Type **python CREATE\_REPORT.py** and hit enter, but don't need to do this if using Luis's script
    - i. You can also write **python c + Tab** and it will autofill the file name
    - ii. On a Mac, it's **python3 CREATE\_REPORT.py**
  - b. When prompted, enter research program IDs, separated by one space, then hit enter. There is no limit to the number of IDs you enter.
  - c. The program will print a progress log as it works through each ID
    - i. If you make a typo and enter an invalid ID (e.g., 10001):
      1. **ERROR: <Program ID> is not a valid program ID.**
    - ii. If the program ID is valid but there are no students from that program in the dataset:
      1. **ERROR: <Program ID> (Program name) is not in this dataset.**
    - iii. If everything goes as planned:
      1. **Report completed: <Program ID> (Program name)**
  - d. Once it's gone through all the IDs you've entered, it will print out a summary telling you which program IDs had reports created and which failed
  - e. This log will also be saved in "Progress logs" with the current date. Every time you run the program again, it will add a record to the bottom of the same progress log file.
  - f. If you run the program for the same ID again, it will overwrite the previous reports

- g. Reports will be saved as csv files with the current date and program ID in the "Unformatted reports" folder

Initiate program →

```
$ python CREATE_REPORT.py
```

Enter IDs →

```
-----  
EOPS Custom Report Writer - 01.22.18 13.21PM  
-----  
Program IDs, separated by a space: 10001 1001 1022
```

Progress log →

```
ERROR: 10001 is not a valid program ID.
```

```
ERROR: Program 1001 (University of ASFDJALK  
) is not in this dataset.
```

```
Report completed: 1022 (University of WOIRUT      )
```

Summary →

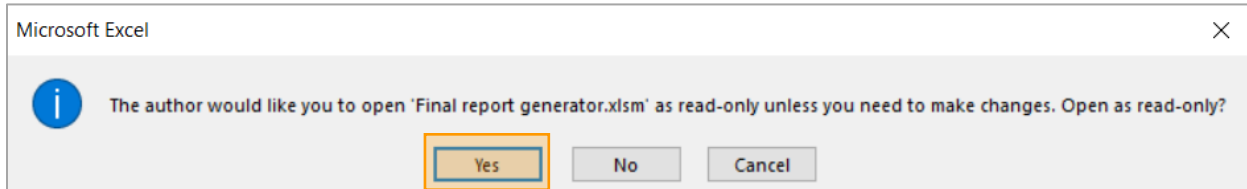
```
-----  
SUMMARY  
-----
```

```
Reports were generated and saved in the "Unformatted Reports" folder f  
or the following programs:  
  [1022]
```

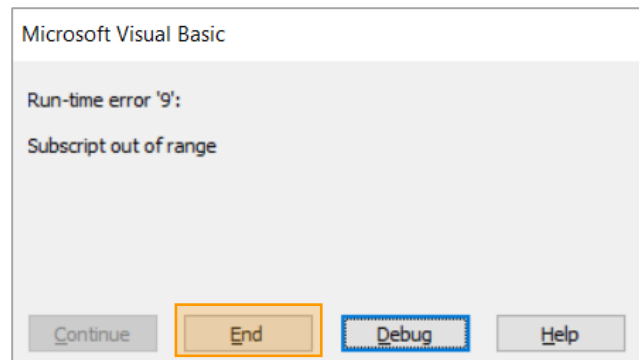
```
Reports for the following programs could not be completed:  
  [10001, 1001]
```

## EXCEL

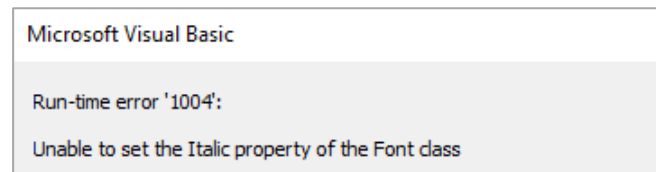
8. Do the following for each unformatted report that you need to put into the final report template:
- From the Custom Reports - EOP > YEAR folder, open **Final report generator.xlsm** (or Mac version) as a read-only file and enable macros if prompted.



- Open the unformatted csv report and hit **Ctrl + shift + R**
- When prompted, enter the program ID (no spaces or punctuation)
- If you enter the wrong ID, you'll get the following error message. Make sure to hit "End" and not "Debug"



- You may also get an error message saying that Italics didn't work, that's OK to end as well. It just means that the report name was not italicized in the suggested citation, which is not a big deal



- The macro will auto-populate the final report. However, **it is crucial that you go through the entire report and visually confirm that nothing went wrong.**
  - Things that could go wrong include blank rows in tables, formatting becoming strange, #NA errors
  - Check that the program name was populated correctly at the top and in the suggested citation in the last page
- Once you've confirmed that everything went fine, hit **Ctrl + Shift + P** to save completed report as a PDF in "Complete reports" folder
  - PDFs will open automatically so make sure that each one looks right before you move to the next one
- Extra step for Macs:**
  - Macros can't directly save to most folders on a Mac. Path to save has to be changed to /Users/username/Library/Containers/com.microsoft.Excel/Data/ -- create an EOPS folder within that and save an alias of it to the desktop
  - Completed report PDFs will save to the "EOPS Reports" alias folder on the Mac's desktop
  - Once you're done running and checking all the reports, move them to the regular "Completed Reports" folder in Dropbox

9. Send completed report to program

10. **Final report generator** can be reused as many times as necessary

- a. Before using again, hit **Ctrl + Shift + C** to clear the last program's data, then open the next unformatted csv file and repeat the steps
- b. Don't save the generator

11. **Delete the downloaded data** – this contains personal respondent information so needs to be deleted as soon as all reports are sent