



Genesys System

User Guide

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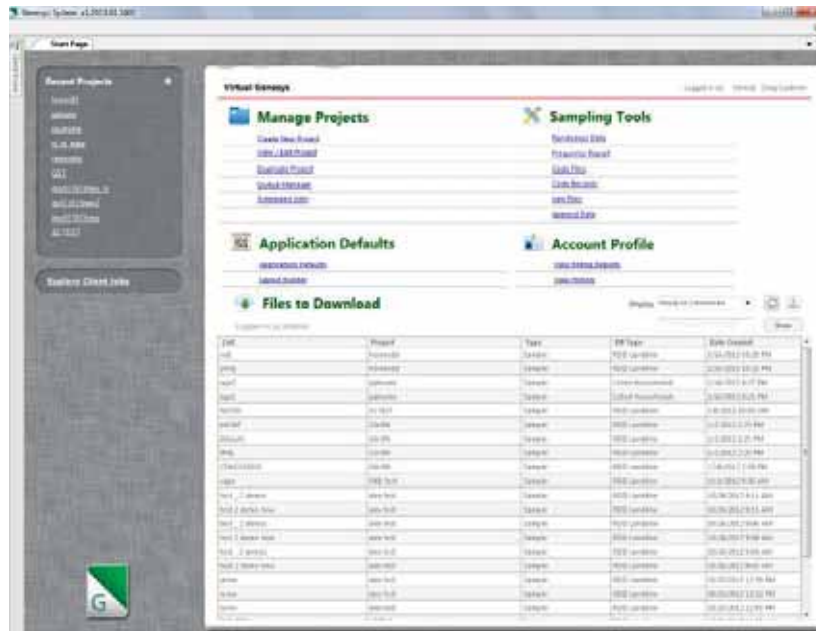
Craig Cardimon, Technical Writer

Submit Feedback

If you find an error in this guide, or if you have suggestions or comments on how to improve it, feel free to send your feedback to techpubs@m-s-g.com.

Please include in your report the guide's title, the topic and section titles, and the fragment of text where you found the error or omission.

Start Page for Genesys System



Genesys System is an online product that generates landline RDD and cellphone RDD.

The Start Page's main sections are:

- Manage Projects
- Application Defaults
- Sampling Tools
- Account Profile
- Files to Download

Manage Projects contains links for:

- [Create New Project](#)
- [View / Edit Project](#)
- [Duplicate Project](#)
- [Queue Manager](#)
- [Scheduled Jobs](#)

Application Defaults contains links for:

- [Application Defaults](#)
- [Layout Builder](#)

Sampling Tools contains links for:

- [Randomize Data](#)
- [Frequency Report](#)

- [Code Files](#)
- [Code Records](#)
- [Join Files](#)
- [Append Data](#)

Account Profile contains links for:

- [View Billing Reports](#)
- [View History](#)

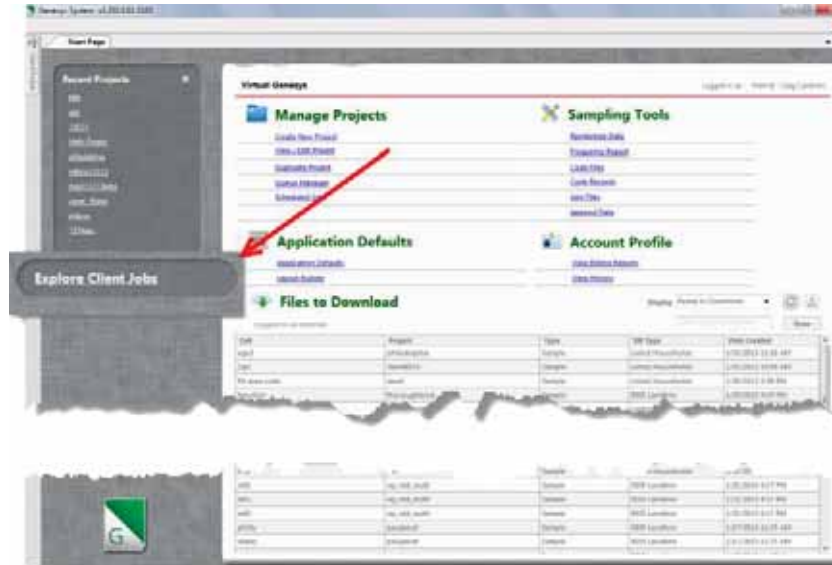
Files to Download lists the files ready for downloading.

The Recent Projects list displays the projects most recently opened.

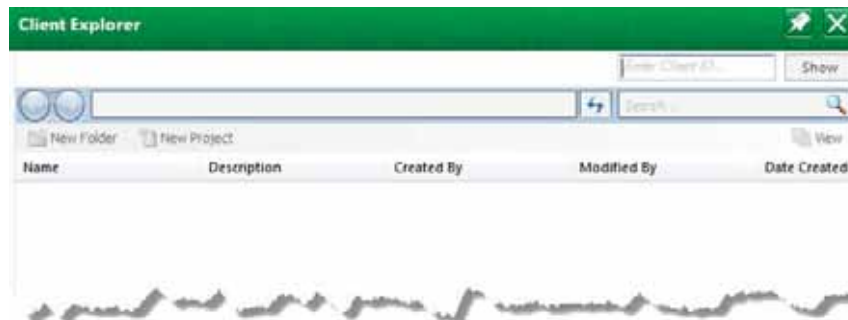
The Explore Client Jobs list displays internal client jobs.

Explore Client Jobs

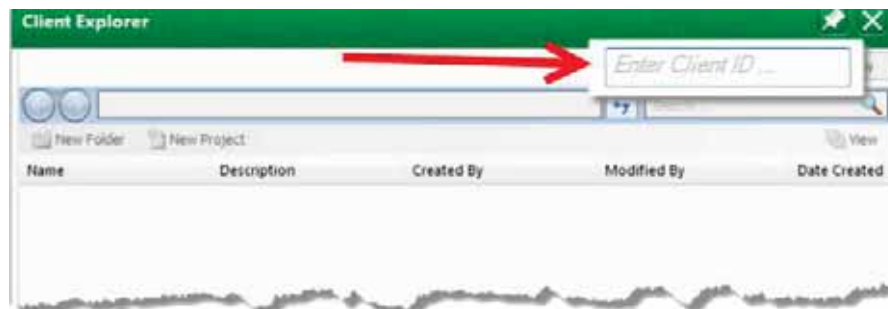
On the Start Page, click Explore Client Jobs.



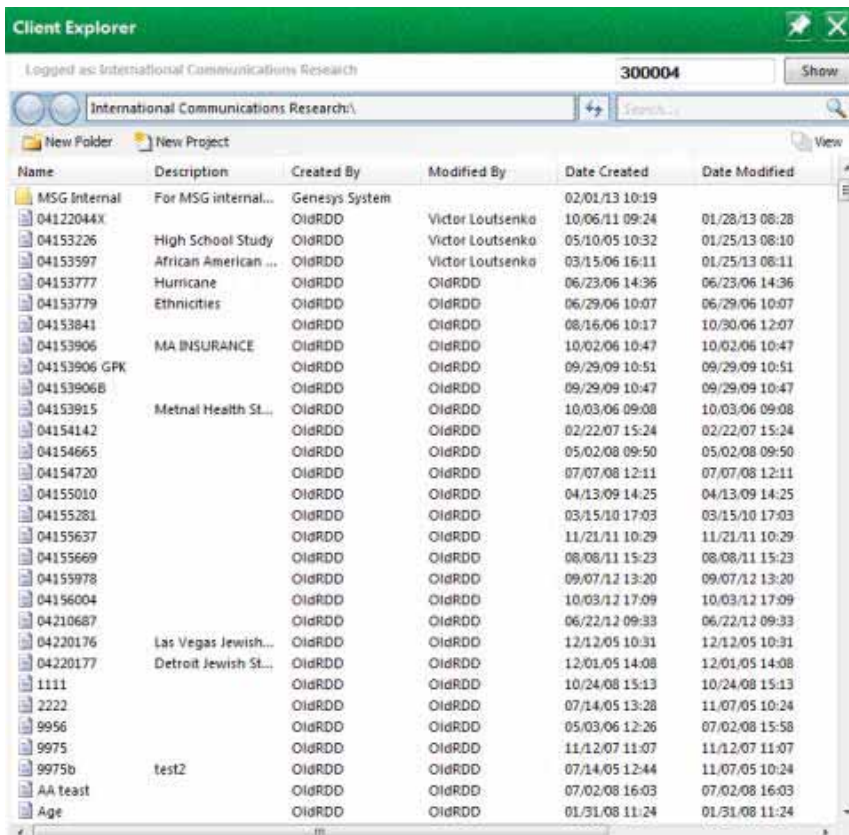
The Client Explorer window opens. This function is for internal use only and isn't seen outside the company.



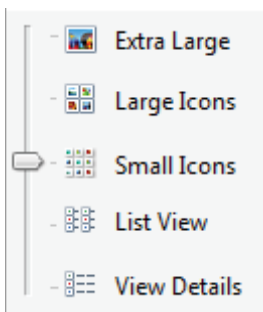
Type in the client ID. Then press Enter or click Show.



The window populates with the projects for that client.



Click the View button, then use the slider to change how items show up in the window.

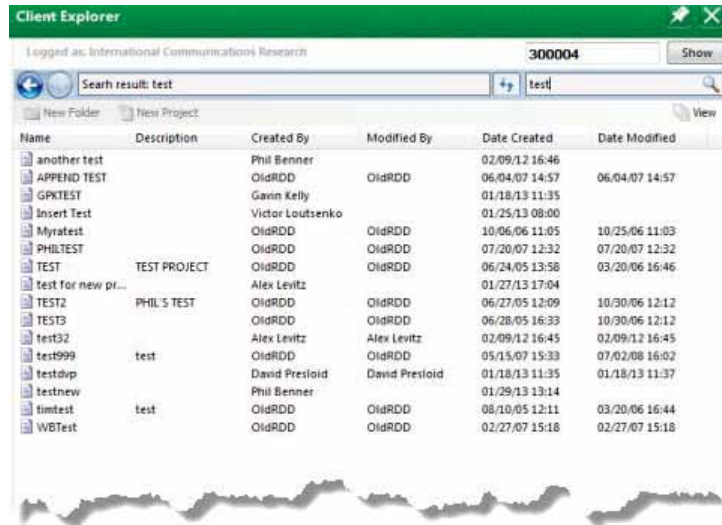


Your options here are:

- Extra Large
- Large Icons
- Small Icons (default)
- List View
- View Details

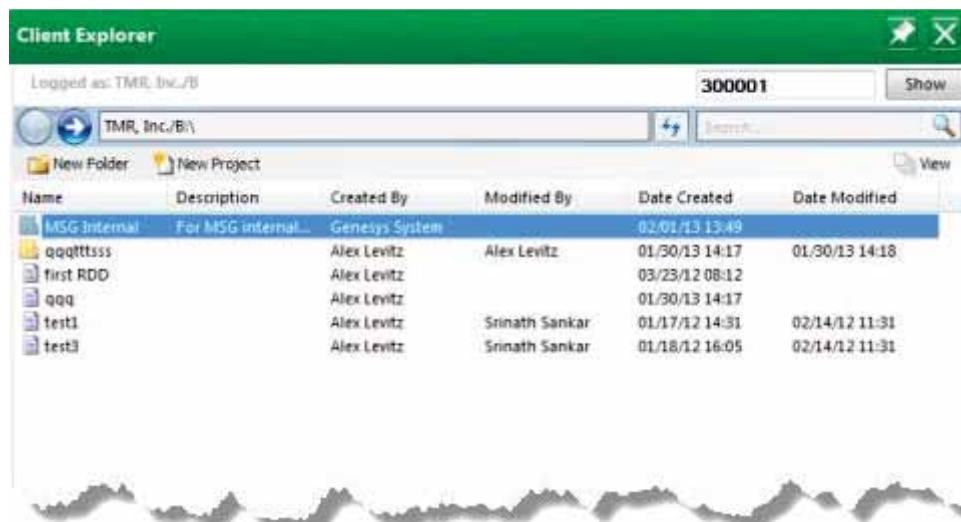
Search

To perform a regular search, type in your term and then press Enter or click the magnifier icon

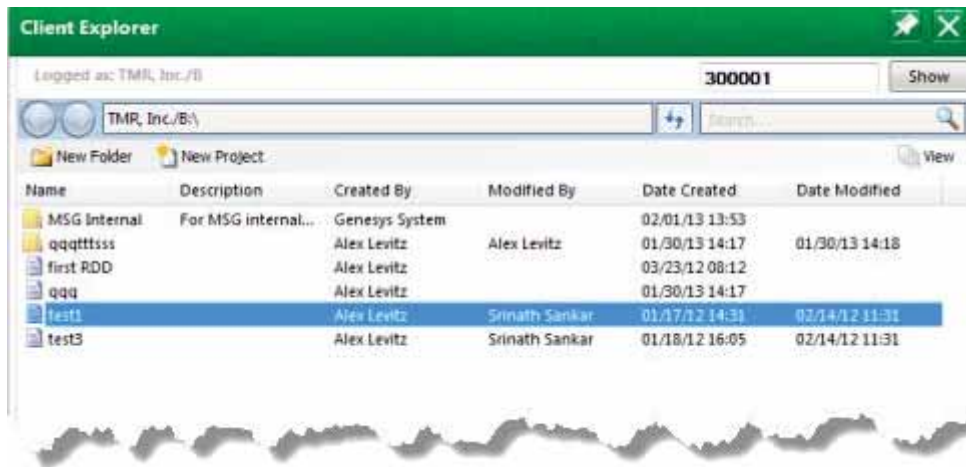


In the example above, "test" is the search term. The search is an automatic wild-card. This means that "test" was interpreted by the search engine as "*test*" with an asterisk on both sides of the search term.

To perform a "start typing" search, click on an item listed, such as the first folder. The search engine starts to search when you start typing only when an item has focus.



Then start typing. In the screen shot above, you see files test1 and test3. In this example, start typing the word "test."



The search engine finds the first file that begins with the word "test."

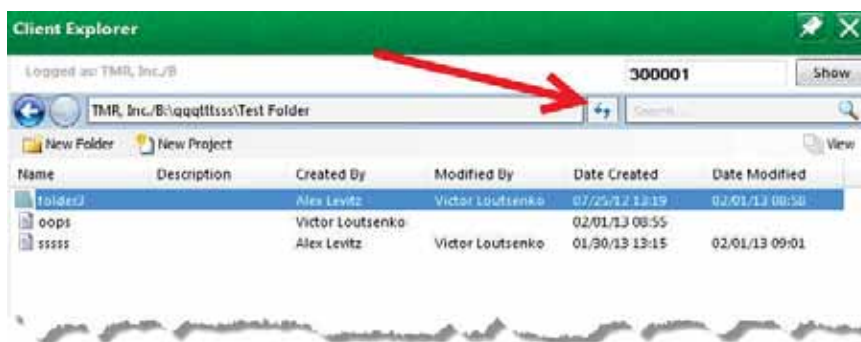
Navigation

If you navigate deep into a folder and want to go back higher in the file system:

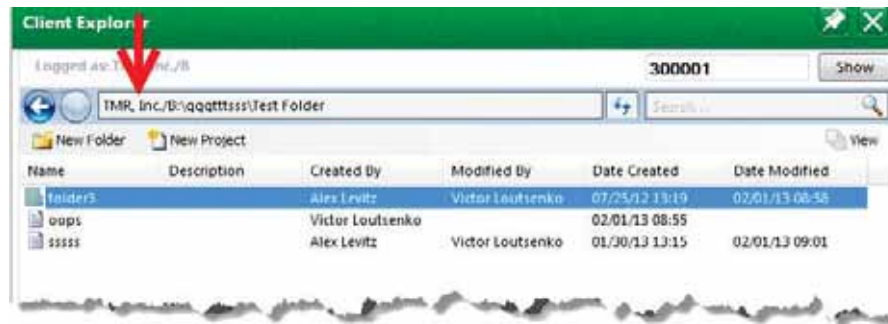
- Keep clicking the left arrow until you get back to where you want to be in the file path.



- Click the refresh icon to return to the root of the file path.

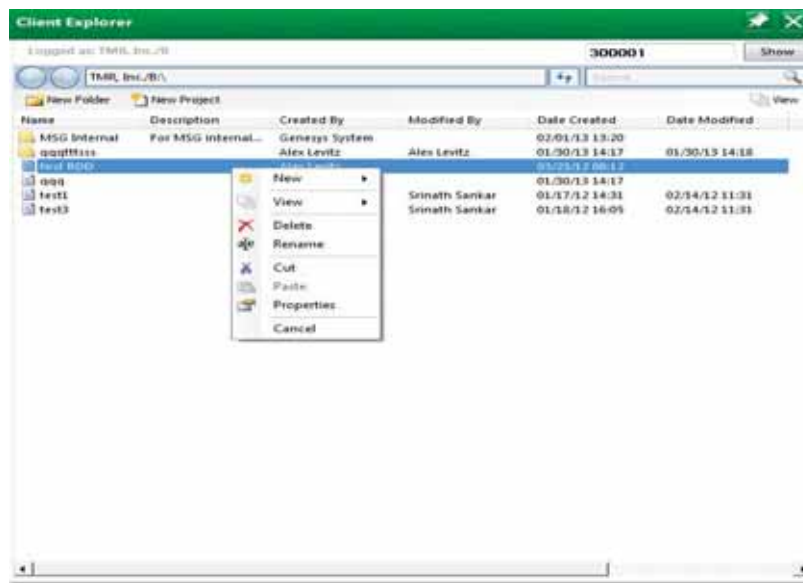


- Double-click the point in the file path you want to return to.

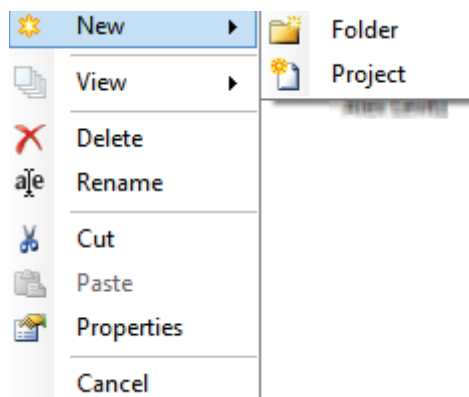


Contextual Menu

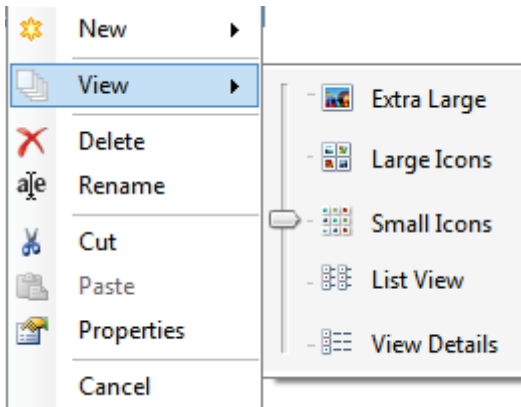
Right-click on a folder or file.



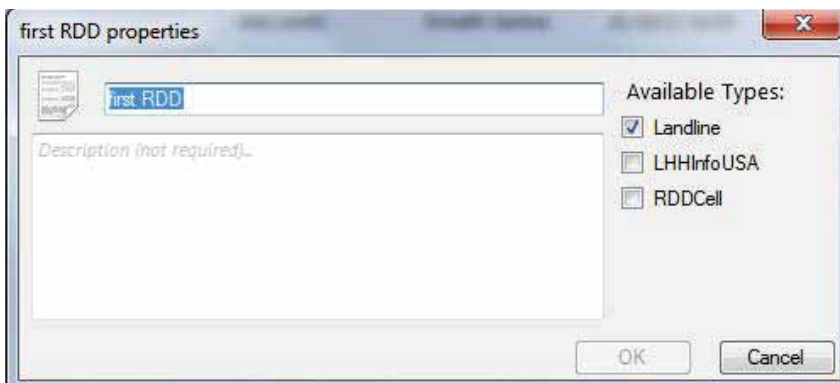
The contextual menu appears. Under New, you have the option to create a project or folder.



Under View, you have the option to change the appearance of the items listed. Other choices include Delete, Rename, Cut, and Properties.



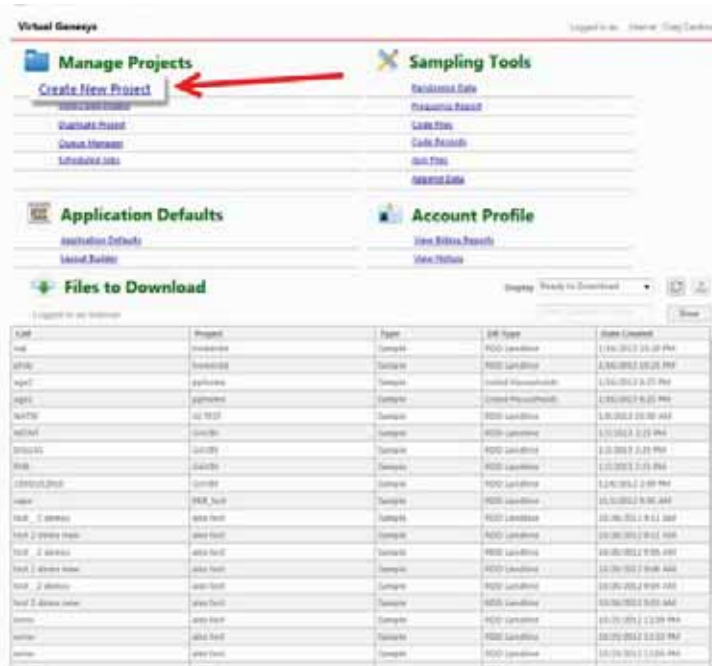
If you click Properties, a window opens that lists the properties of that file or folder.



If you need to move files or folders around, simply drag them where you want them. Note that you cannot drag a file to where it already is.

Create a New Project

To open a new project, click Create New Project, which is located under Manage Projects on the Start Page.



The Create New Project window opens.

The 'Create new project' window has a green header bar. It contains a 'Name' text box, a 'Description' text area, and a 'Sample Types' section. The 'Sample Types' section has several checkboxes: 'RDD Landline Sample' (checked), 'RDD Cellular Sample' (checked), 'Business Sample' (unchecked), 'Listed Households Sample' (checked), 'International Business' (unchecked), and 'Address Based Sample' (checked). At the bottom right, there are 'Save' and 'Close' buttons.

The Sample Types licensed to you are selected by default. The others are unavailable.

If you're licensed for "Address Based Sample," for example, it is already selected. Clear any sample types you don't want.

Note: ABS cells can be added only to ABS projects. LHH and RDD cells can be

added to either LHH or RDD projects.

Type in a name for your new project. Description is optional. Save.

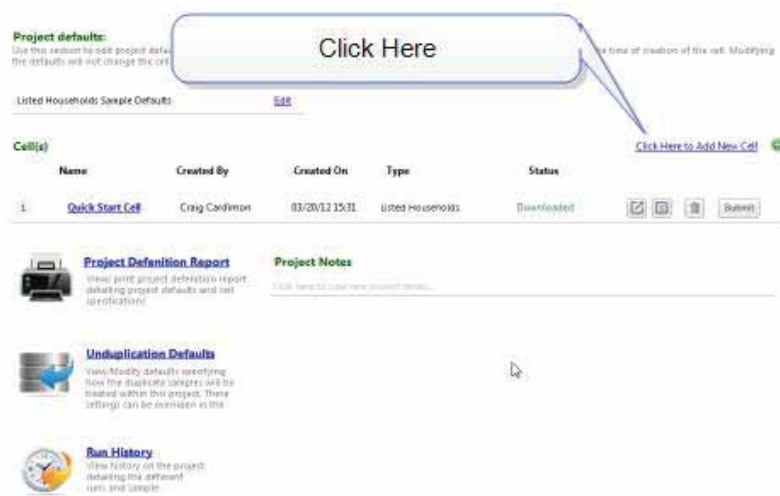
The new project window opens.

The screenshot shows a web interface for a project named "Craig's New ABS Project". At the top, there is a search bar and a "Save" button. Below this, a section titled "Project defaults:" explains that these defaults will be carried over into the cell at the time of creation. There are two tabs: "Address Based Sample Defaults" (selected) and "List". Below the tabs, there is a "Cell(s)" section with a "Click Here to Add New Cell" link. A table with columns "Name", "Created By", "Created On", "Type", and "Status" is visible. Below the table, there are three main sections: "Project Definition Report" (with a printer icon), "Unduplication Defaults" (with a globe icon), and "Run History" (with a clock icon). Each section has a brief description of its function. A "Sign your help here" link is at the bottom right.

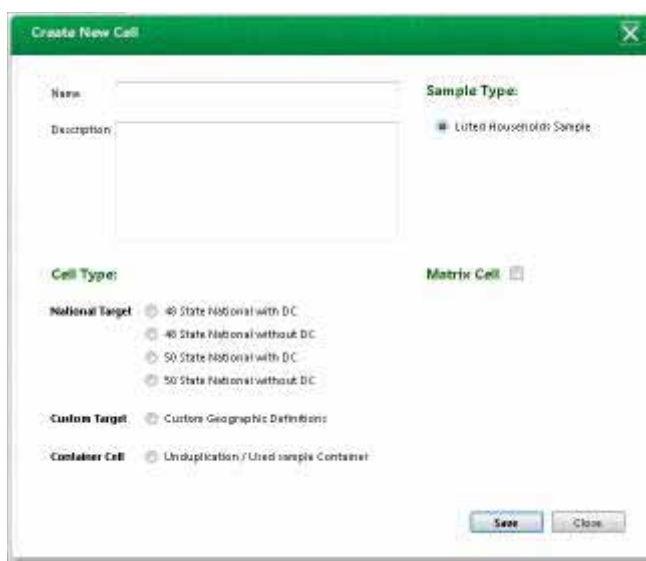
Use this window to edit the project defaults for the sampling types supported. These defaults are carried over into the cell when it is created.

Create a New Cell

Add a new cell by clicking "Click Here to Add New Cell" from the project page.



The Create New Cell window opens.



The Sample Type choices vary according to the kind of project you created.

NOTE: If you create an ABS project, your only cell choice is Address-Based Sample.

NOTE: If you create an Listed Households, RDD Landline, or RDD Cellular project, your cell choices are RDD Landline Sample, Listed Households Sample, and RDD Cellular Sample.

Type in a name for the new cell. The description is optional.

Select the type of sample.

Under Cell Type, the choices for National Target are:

- 48 State National with DC
- 48 State National without DC
- 50 State National with DC
- 50 State National without DC

Other geography choices are:

- Custom Target, which uses Custom Geographic Definitions
- Container Cell, which is an Unduplication / Used Sample Container

A Custom Target is anything other than national geography.

A Container Cell is used when the client has sample they need deduped against and that data needs to be uploaded.

After selecting your Cell Type, click Save.

Matrix Cells

In the Create New Cell window:

- Select the Matrix Cell option.
- Select a sample type.
- If you select an RDD Landline Sample or RDD Cellular Sample, then you also need to select the database version from a popup list.
- If you select Listed Households Sample, then "Custom Geographic Definitions" is selected by default

To use a Matrix Cell, create the geography at the project level in the defaults. Something has to be the same, such as geography or demographics.

Save.

To add a cell to a project, click the link in the project window that reads, "Click here to add a new cell."

To open an existing cell, click the cell's name in the project window.

Listed Households Sample Cell

If you create a cell using Listed Households Sample, the cell editor opens to the Cell Info tab.

Click the Options tab to set the options at the project level.

The screenshot shows a software window titled "Listed Households defaults for project Craig Test". It has a green header bar with tabs: "Cell Info", "Geo Filters", "Household", "Race by Density", "Income by Density", "Options", and "Definitions Report". The "Options" tab is selected. The main content area is titled "Default Summary Information" and contains several sections: "Geographic Filters" (Not Defined), "Demographic Filters" (Household Compositions: Not Defined, Specific Age and Gender: Not Defined), "Race" (Not Defined), "Income" (Not Defined), and "Sample Options" (Layout Format: Standard). At the bottom right are "Save" and "Close" buttons. A callout bubble with the text "Click Options tab" points to the "Options" tab in the header.

In the Sample Options window, select either Run Count or Pull Sample.

The screenshot shows the same software window, but now the "Sample Options" tab is selected. It contains two main sections. The left section has two radio buttons: "Run Count" (selected) and "Pull Sample". Below "Run Count" is a text box for "Records". Below "Pull Sample" is a text box for "Records". The right section has several checkboxes: "Records Must Have Phone Number" (checked), "Include Records with Incomplete / Missing Addresses" (unchecked), and "Create Replicates" (unchecked). Below these are text boxes for "Number of Replicates" and "Starting Replicate Number". At the bottom right is a "Schedule" link. At the bottom are "Save" and "Close" buttons.

For Pull Sample, remember to enter the number of Records.

Layout, which is defaulted to Enhanced, becomes grayed out and unavailable if you select Run Count. To change the layout to Standard, you must first make Lay-out available again. To do this, select Pull Sample. Layout should now be re-activated for use. Change the layout to Standard if needed. Re-select Run Count if needed.

"Save As," which is defaulted to Text (ASCII), becomes grayed out and unavailable if you select Run Count. To change the Save As to either CSV (comma

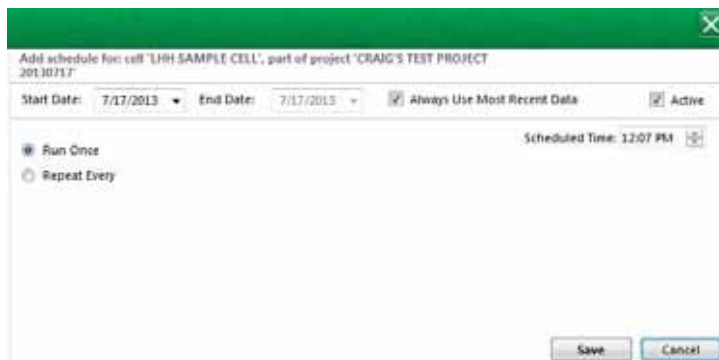
delimited) or Text (tab delimited), you must first make Save As available again. To do this, select Pull Sample. Save As should now be re-activated for use. Change as needed. Re-select Run Count if needed.

The choices you make here will be the default for every job in the cell.

Your Record Options are:

- Records Must Have Phone Number
- Include Records with Incomplete / Missing Addresses
- Create Replicates
- Number of Replicates
- Starting Replicate Number
- Select Fields for Frequency Report

Click Schedule.



Your options are:

- Start Date
- End Date
- Always Use Most Recent Data
- Active
- Run Once or Repeat Every

If you select "Repeat Every," more options appear. You will need to select how many times to run the job (1-12), and a time span of Days, Weeks, or Months.



Click Save to preserve any changes, then click Close.

The Listed Household Cell Editor opens to the Cell Info tab.

Work through the tabs from left to right:

- Geo Filters
- Household
- Race by Density
- Income by Density
- Options
- Deduplicate

Geo Filters

First, define the geography. Click the Geo Filters tab to open the Geographic Filters window.

To create new geographic filters, click Add New Geographic Filters.

The From Genesys tab opens. The name of the window is Select from Genesys.

From Genesys

The Geographic Filters window opens to the From Genesys tab.

The screenshot shows the 'Geographic Filters' window with the 'From Genesys' tab selected. The window has a green header bar with the title 'Geographic Filters' and a close button. Below the header, there are four tabs: 'From Genesys' (active), 'Input Data', 'From File', and 'Error'. The main content area is titled 'Select from Genesys' and contains three steps:

- Step 1:** Select the type of geographic specification that you are adding:
 ☒ Include ☐ Exclude
- Step 2:** Select Geography Type:
 A dropdown menu shows '2000 Census Block'.
- Step 3:** Please select the geographic data that will be defined in your cell specifications:
 A search box labeled 'Filter' is present above a large empty rectangular area for results.

At the bottom left, a status message reads 'The geography[] have been updated'. At the bottom right is a 'Close' button.

Work through the tabs from left to right:

- From Genesys
- Input Data (hand entering)
- Import From File

Step 1, "Select the type of geographic specification that you are adding." The choices are "Include" (default) and "Exclude."

Step 2, "Select Geography Type."

Use the search box to select a geographic target. For example, type "phil" into the search box to find the Philadelphia FIPS. When using an asterisk (*), type in "42*," for instance, to find any FIPS codes starting with "42."

Geographic Filters From Genesys Input Data From File Error X

Select from Genesys

Step 1: Select the type of geographic specification that you are adding:
☒ Include ☐ Exclude

Step 2: Select Geography Type:
 FIPS 42 Binoculars Icon

Step 3: Please select the geographic data that will be defined in your cell specifications:
 Filter 67 rows available

Code	Name	Location
42001	Adams	PA
42003	Allegheny	PA
42005	Armstrong	PA
42007	Beaver	PA
42009	Bedford	PA
42011	Berks	PA
42013	Blair	PA
42015	Bradford	PA
42017	Bucks	PA
42019	Butler	PA
42021	Cambria	PA
42023	Cameron	PA

Close

Using the asterisk by itself lists every variable available for that level of geography. To see lists of FIPS codes, visit <http://www.m-s-g.com/Web/genesys/resources.aspx>. Remember to click the binoculars icon to initiate a search and generate a list of results.

Step 3, "Please select the geographic data that will be defined in your cell specifications." Highlight the names you want, or enter a code into the Filter box, and then click Save to process the results.

Geographic Filters From Genesys Input Data From File Error X

Select from Genesys

Step 1: Select the type of geographic specification that you are adding:
☒ Include ☐ Exclude

Step 2: Select Geography Type:
 CBSA Metro Code * Binoculars Icon

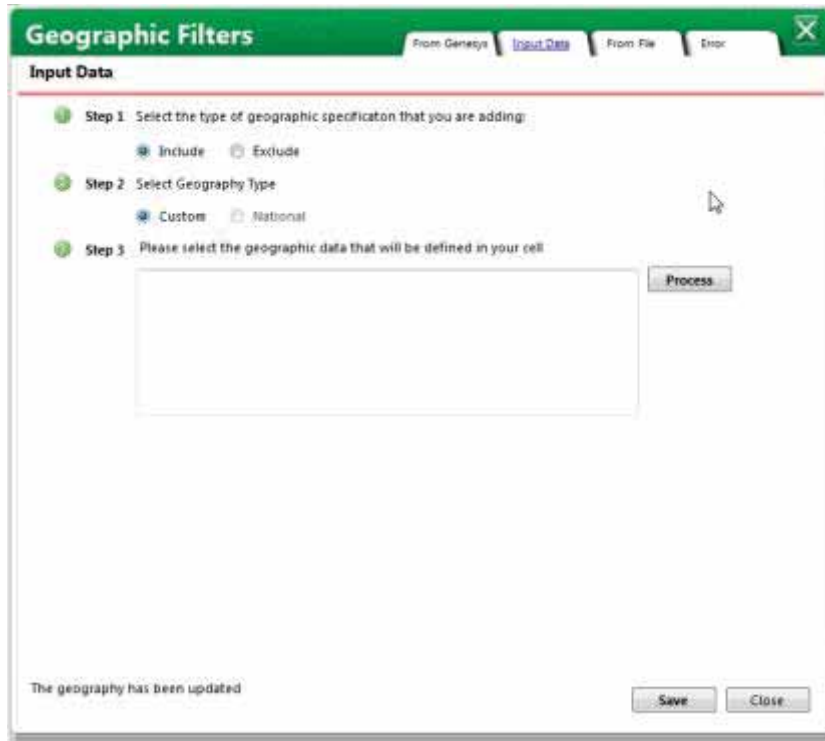
Step 3: Please select the geographic data that will be defined in your cell specifications:
 Filter 388 rows available

Code	Name
10180	Abilene, TX
10420	Akron, OH
10500	Albany, GA
10580	Albany-Schenectady-Troy, NY
10740	Albuquerque, NM
10780	Alexandria, LA
10990	Allentown-Bethlehem-Easton, PA-NJ
11020	Altoona, PA
11100	Amarillo, TX
11180	Annes, GA
11260	Anchorage, AK
11300	Anderson, IN

Close

Input Data

To set up input data, click the Input Data tab, and configure as needed.



The screenshot shows the 'Geographic Filters' dialog box with the 'Input Data' tab selected. The dialog has a green header bar with the title 'Geographic Filters' and a close button. Below the header, there are four tabs: 'From Genesys', 'Input Data' (selected), 'From File', and 'Error'. The 'Input Data' tab contains three steps:

- Step 1:** Select the type of geographic specification that you are adding. It has two radio buttons: 'Include' (selected) and 'Exclude'.
- Step 2:** Select Geography Type. It has two radio buttons: 'Custom' (selected) and 'National'.
- Step 3:** Please select the geographic data that will be defined in your cell. This step has a large empty rectangular box for selection and a 'Process' button to its right.

At the bottom of the dialog, there is a status message 'The geography has been updated' and two buttons: 'Save' and 'Close'.

Step 1, "Select the type of geographic specification that you are adding." The choices are "Include" (default) and "Exclude."

Step 2, "Select Geography Type." The choices are "Custom" (default) and "National."

Step 3, "Please select the geographic data that will be defined in your cell." Be sure to Save any changes.

Import From File

To import from a file, click the From File tab, and configure as needed.

Geographic Filters

From Geography | Input Data | **From File** | Error

Import from File

Step 1: Select the type of geographic specification that you are adding:
☒ Include ☐ Exclude

Step 2: Select Geography Type
 CBSA Metro Code

Step 3: Please select file to be imported:
 Browse

Step 4: Set starting position for import. View file if needed: 1 View

Save Close

Step 1, "Select the type of geographic specification that you are adding." The choices are "Include" (default) and "Exclude."

Step 2, "Select Geography Type." Note that the options "NPA," "NPA NXX Bank," "NPA NXX Block," "OCN," and "Rate Center" are available for internal use only and aren't seen outside the company.

Step 3, "Please select file to be imported." Click Browse to find the file.

Step 4, "Set starting point for Import. View file if needed."

Be sure to Save any changes.

Error

To see a list of possible errors, click the Error tab.

Geographic Filters

From Geography | Input Data | From File | **Error**

Error List

No Errors Found

The geography has been updated.

Close

Quick Start Cell

Cell Info | Geo Filters | Household | Race by Density | Income by Density | Options | Deduplicate

Household Composition

Surname ☐ Hispanic ☐ Asian

Home ☐ Owner-Occupied Housing Units ☐ Renter-Occupied Housing Units Presence of Children ☐

Income in Thousands It between and

☐ Inferred Age and Gender ☒ Specific Age and Gender

Individual Age	Gender	Head of HH

Save Close

- Is between
- Is Equal to
- Is Greater Than
- Is Less Than
- Is Greater Than or Equal to
- Is Less Than or Equal to

9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100 101 102 103 104 105 106 107 108 109 110 111 112 113 114 115 116 117 118 119 120 121 122 123 124 125 126 127 128 129 130 131 132 133 134 135 136 137 138 139 140 141 142 143 144 145 146 147 148 149 150 151 152 153 154 155 156 157 158 159 160 161 162 163 164 165 166 167 168 169 170 171 172 173 174 175 176 177 178 179 180 181 182 183 184 185 186 187 188 189 190 191 192 193 194 195 196 197 198 199 200 201 202 203 204 205 206 207 208 209 210 211 212 213 214 215 216 217 218 219 220 221 222 223 224 225 226 227 228 229 230 231 232 233 234 235 236 237 238 239 240 241 242 243 244 245 246 247 248 249 250 251 252 253 254 255 256 257 258 259 260 261 262 263 264 265 266 267 268 269 270 271 272 273 274 275 276 277 278 279 280 281 282 283 284 285 286 287 288 289 290 291 292 293 294 295 296 297 298 299 300 301 302 303 304 305 306 307 308 309 310 311 312 313 314 315 316 317 318 319 320 321 322 323 324 325 326 327 328 329 330 331 332 333 334 335 336 337 338 339 340 341 342 343 344 345 346 347 348 349 350 351 352 353 354 355 356 357 358 359 360 361 362 363 364 365 366 367 368 369 370 371 372 373 374 375 376 377 378 379 380 381 382 383 384 385 386 387 388 389 390 391 392 393 394 395 396 397 398 399 400 401 402 403 404 405 406 407 408 409 410 411 412 413 414 415 416 417 418 419 420 421 422 423 424 425 426 427 428 429 430 431 432 433 434 435 436 437 438 439 440 441 442 443 444 445 446 447 448 449 450 451 452 453 454 455 456 457 458 459 460 461 462 463 464 465 466 467 468 469 470 471 472 473 474 475 476 477 478 479 480 481 482 483 484 485 486 487 488 489 490 491 492 493 494 495 496 497 498 499 500 501 502 503 504 505 506 507 508 509 510 511 512 513 514 515 516 517 518 519 520 521 522 523 524 525 526 527 528 529 530 531 532 533 534 535 536 537 538 539 540 541 542 543 544 545 546 547 548 549 550 551 552 553 554 555 556 557 558 559 560 561 562 563 564 565 566 567 568 569 570 571 572 573 574 575 576 577 578 579 580 581 582 583 584 585 586 587 588 589 590 591 592 593 594 595 596 597 598 599 600 601 602 603 604 605 606 607 608 609 610 611 612 613 614 615 616 617 618 619 620 621 622 623 624 625 626 627 628 629 630 631 632 633 634 635 636 637 638 639 640 641 642 643 644 645 646 647 648 649 650 651 652 653 654 655 656 657 658 659 660 661 662 663 664 665 666 667 668 669 670 671 672 673 674 675 676 677 678 679 680 681 682 683 684 685 686 687 688 689 690 691 692 693 694 695 696 697 698 699 700 701 702 703 704 705 706 707 708 709 710 711 712 713 714 715 716 717 718 719 720 721 722 723 724 725 726 727 728 729 730 731 732 733 734 735 736 737 738 739 740 741 742 743 744 745 746 747 748 749 750 751 752 753 754 755 756 757 758 759 760 761 762 763 764 765 766 767 768 769 770 771 772 773 774 775 776 777 778 779 780 781 782 783 784 785 786 787 788 789 790 791 792 793 794 795 796 797 798 799 800 801 802 803 804 805 806 807 808 809 810 811 812 813 814 815 816 817 818 819 820 821 822 823 824 825 826 827 828 829 830 831 832 833 834 835 836 837 838 839 840 841 842 843 844 845 846 847 848 849 850 851 852 853 854 855 856 857 858 859 860 861 862 863 864 865 866 867 868 869 870 871 872 873 874 875 876 877 878 879 880 881 882 883 884 885 886 887 888 889 890 891 892 893 894 895 896 897 898 899 900 901 902 903 904 905 906 907 908 909 910 911 912 913 914 915 916 917 918 919 920 921 922 923 924 925 926 927 928 929 930 931 932 933 934 935 936 937 938 939 940 941 942 943 944 945 946 947 948 949 950 951 952 953 954 955 956 957 958 959 960 961 962 963 964 965 966 967 968 969 970 971 972 973 974 975 976 977 978 979 980 981 982 983 984 985 986 987 988 989 990 991 992 993 994 995 996 997 998 999 1000 1001 1002 1003 1004 1005 1006 1007 1008 1009 1010 1011 1012 1013 1014 1015 1016 1017 1018 1019 1020 1021 1022 1023 1024 1025 1026 1027 1028 1029 1030 1031 1032 1033 1034 1035 1036 1037 1038 1039 1040 1041 1042 1043 10

[illegible]

Complete the grid that appears. Click the disc icon to save any changes.

Race by Density

To set up the Race composition, targeting race density level within census geography, click the Race by Density tab and configure as needed.

The choices here are:

- Hispanic/Latino
- White
- Black/African American
- American Indian/Alaskan Native
- Asian
- Native Hawaiian/Pacific Islander

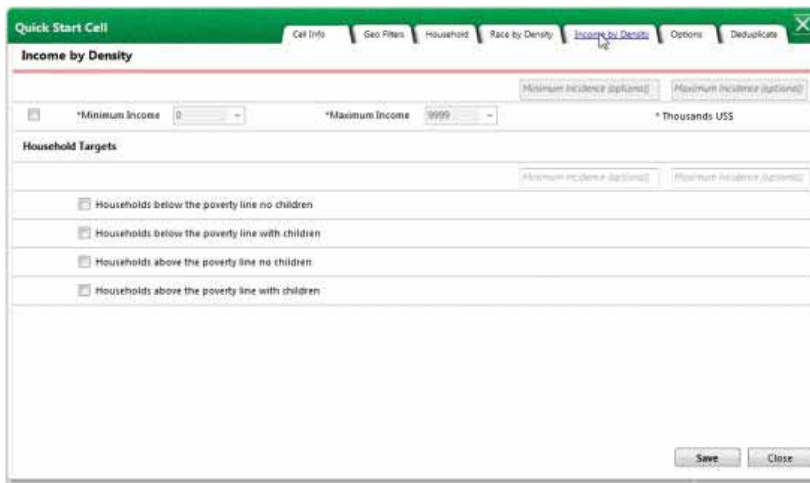
- Some Other Race
- Two or More Races

Complete Minimum Incidence (optional) and Maximum Incidence (optional) as needed.

Be sure to Save any changes.

Income by Density

To set up the income composition, click the Income by Density tab and configure as needed.



To work with Minimum Income and Maximum Income, select the adjacent check box, and make list selections as needed.

Other choices here are:

- Families below the poverty line no children
- Families below the poverty line with children
- Families above the poverty line no children
- Families above the poverty line with children

Complete Minimum Incidence (optional) and Maximum Incidence (optional) as needed.

Be sure to Save any changes.

Options

To set up the Sample Options, click the Options tab and configure as needed.

On the Sample Options window, select either Run Count or Pull Sample.

For Pull Sample, remember to enter the number of Records.

Layout, which is defaulted to Enhanced, becomes grayed out and unavailable if you select Run Count. To change the layout to Standard, you must first make Layout available again. To do this, select Pull Sample. Layout should now be re-activated for use. Change the layout to Standard if needed. Re-select Run Count if needed.

"Save As," which is defaulted to Text (ASCII), becomes grayed out and unavailable if you select Run Count. To change the Save As to either CSV (comma delimited) or Text (tab delimited), you must first make Save As available again. To do this, select Pull Sample. Save As should now be re-activated for use. Change as needed. Re-select Run Count if needed.

The choices you make here will be the default for every job in the cell.

Your Record Options are:

- Records Must Have Phone Number
- Include Records with Incomplete / Missing Addresses
- Create Replicates
- Number of Replicates
- Starting Replicate Number
- Select Fields for Frequency Report

Click Schedule.

The screenshot shows a dialog box titled 'Add schedule for cell 'LHH SAMPLE CELL', part of project 'CRAIG'S TEST PROJECT' 20130717'. It contains fields for 'Start Date' (7/17/2013) and 'End Date' (7/17/2013), a checkbox for 'Always Use Most Recent Data' (checked), and a checkbox for 'Active' (checked). Below these are radio buttons for 'Run Once' (selected) and 'Repeat Every'. A 'Scheduled Time' field shows '12:07 PM'. At the bottom are 'Save' and 'Cancel' buttons.

Your options are:

- Start Date
- End Date
- Always Use Most Recent Data
- Active
- Run Once or Repeat Every

If you select "Repeat Every," more options appear. You will need to select how many times to run the job (1-12), and a time span of Days, Weeks, or Months.

The screenshot shows the 'Repeat Every' radio button selected. Next to it is a text input field containing the number '1' and a dropdown arrow. To the right is a dropdown menu currently showing 'Day(s)'.

Click Save to preserve any changes, then click Close.

Deduplicate

To set up the Deduplication Options, click the Deduplicate tab and configure as needed.

The screenshot shows the 'LHH Sample Cell' window with the 'Deduplicate' tab selected. The 'Deduplication Options' section has four radio buttons: 'No Deduplication' (selected), 'Current Cell Only', 'All Linked Households Cell(s) in this Project', and 'Selected Linked Households Cell(s)'. At the bottom, there are two checkboxes: 'Reset Previously Pulled Phone Numbers for Current Cell' and 'Reset Previously Pulled Phone Numbers for Current Project', both of which are unchecked. 'Save' and 'Close' buttons are at the bottom right.

The options across the top of this window are:

- No Deduplication
- Current Cell Only
- All Listed Household Cells in this Project (default)
- Selected Listed Household Cells (use this option to deduplicate from a specific time frame)

The options across the bottom of this window are:

- Reset Previously Pulled Phone Numbers for Current Cell
- Reset Previously Pulled Phone Numbers for Current Project

Be sure to Save any changes.

Custom Fields

To manage the custom fields, click the Custom Fields tab and configure as needed.

Order	Field Name	Length	Value	Delete all Custom Fields
1	First custom field	7	value 1	Edit Delete
2	second field	9	xxxxxxxxx	Edit Delete
3				Add New Custom Field

Save Close

Use the options on this window to delete all your custom fields, edit them one by one, delete them one by one, or add a new custom field.

This feature, which is for InfoUSA only (Listed Households), appends values to your sample. You will see this data in the actual TXT or CSV file that is created. The "Value" will be in each line in the file. For CSV files, the "Field Name" (non-Matrix cell) or "Name" (Matrix Cell) will be in the Header file. This information will be put into the File Layout that is downloaded with the sample and included in the Cell Definition file.

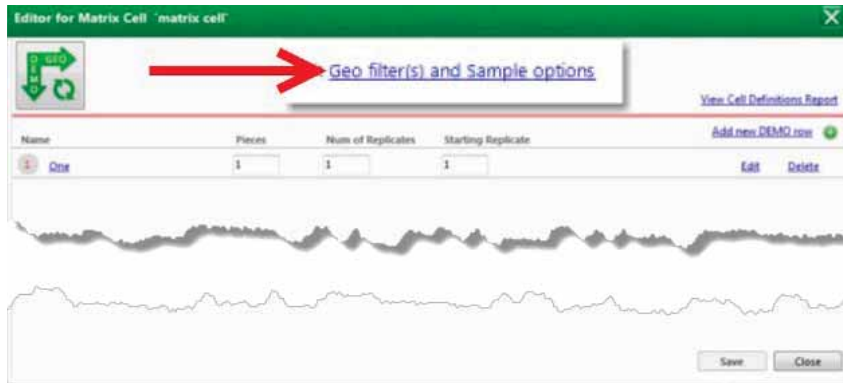
When adding a new custom field, fill in the Field Name, Length, and Value.

NOTE: You must press Enter or click Add New Custom Field after entering data into the fields to save the data. Clicking Save on this window does not save this data.

As the user, you are not allowed to change the Field Name, Length, or the order. If you need to do that, you must delete the fields and add them again. Field Name does not accept commas, or single quotes or double quotes.

Add Custom Fields to a Matrix Cell

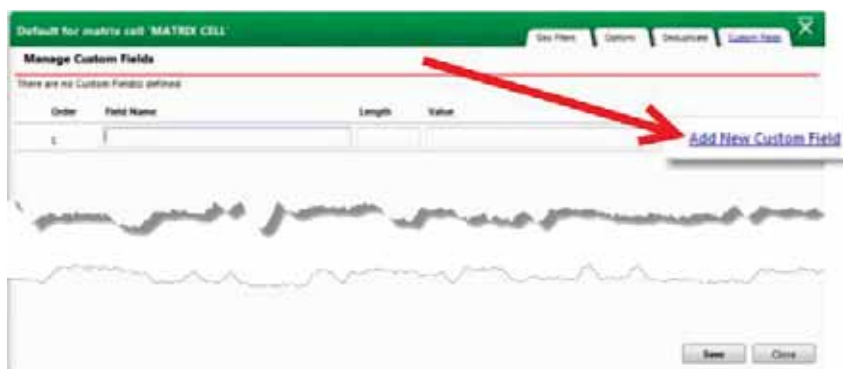
To add a custom field to a Matrix Cell, open the cell, and click "Geo filters and Sample options."



In the default window that opens, click the Custom Fields tab.



Now click "Add New Custom Field."

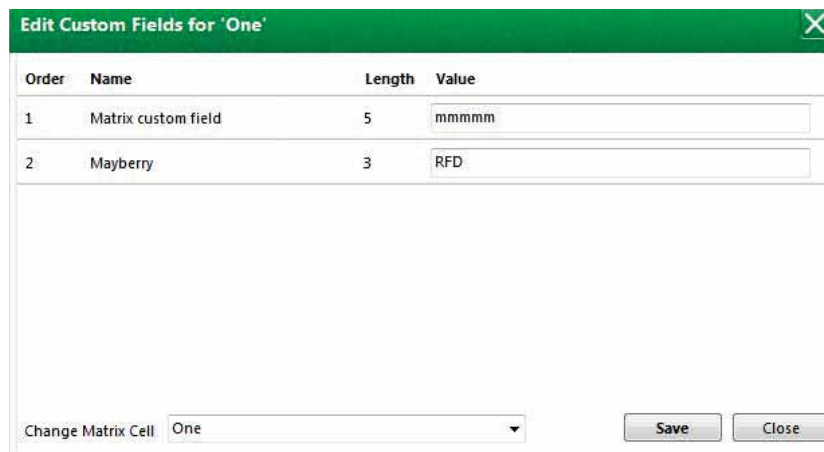


Type in values for Field Name, Length, and Value. Press Enter to save. Now close the window.

Back at the Editor for Matrix Cell, click Edit Custom Fields.



The Edit Custom Fields window opens. Only the "Value" fields may be edited here.



Modify each row by using the Change Matrix Cell list at the bottom. Click the list and the select the row you want to edit.

Manipulate Rows in Matrix Cell

To manipulate the rows in a Matrix Cell, open the cell, and right-click the down arrow to the left of the Name column. Note: This functionality is available only for users inside the company firewall.



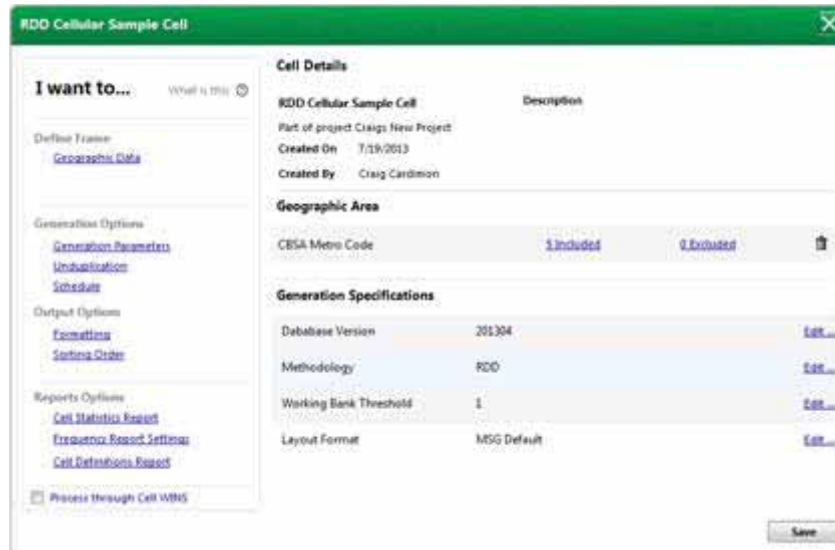
Your options are:

- Populate all rows with same number of pieces from first row
- Populate all rows with the same replicates from the first row
- Delete All Matrix Rows

Modify as needed.

RDD Cellular Sample Cell

Use the cell editor that opens when you create a new RDD Cellular Sample Cell to define your frame, modify your generation options, change your output options, and set your report options.



On the left side of the window, the "I want to" section contains many options:

Under Define Frame, your choice is:

- Geographic Data

Under Generation Options, your choices are:

- Generation Parameters
- Unduplication
- Schedule

Under Output Options, your choices are:

- Formatting
- Sorting Order

Under Reports Options, your choices are:

- Cell Statistics Report
- Frequency Report Settings
- Cell Definitions Report

The last item on the left side, at the bottom of the window, is the option to "Process Through Cell WINS."

- Cell WINS is for RDD Cellular cells only.
- Cell WINS is for internal use only (inside the company firewall).

- By default the check box is not selected.
- Cell WINS determines whether a Cellular RDD number is working, non-working, or unknown.
- The Cell WINS process involves emailing the sample to a third party for processing. Afterward, the sample is emailed back to the person who submitted the cell so they can merge the processed sample with the original sample.

On the right side of the window, more options are listed under Cell Details:

Under Geographic Area, you see the codes you used. Click the links see the codes included and excluded.

Under Demographic Area, you see the demographics you used. Click Edit to modify these.

Under Generation Specifications, you see the Database Version and Methodology used. Click Edit to modify.

Geographic Data

Click Geographic Data to view or modify the Geographic Filters being applied to your cell.

From Genesys

The Geographic Filters window opens to the From Genesys tab.

The screenshot shows the 'Geographic Filters' window with the 'From Genesys' tab selected. The window has a green header bar with the title 'Geographic Filters' and a close button. Below the header, there are four tabs: 'From Genesys' (active), 'Input Data', 'From File', and 'Error'. The main content area is titled 'Select from Genesys' and contains three steps:

- Step 1:** Select the type of geographic specification that you are adding:
☒ Include ☐ Exclude
- Step 2:** Select Geography Type:
A dropdown menu shows '2000 Census Block'.
- Step 3:** Please select the geographic data that will be defined in your cell specifications:
A 'Filter' label is above a large empty rectangular box.

At the bottom left, a status message reads 'The geography(s) have been updated'. At the bottom right is a 'Close' button.

Work through the tabs from left to right:

- From Genesys
- Input Data (hand entering)

- Import From File

Step 1, "Select the type of geographic specification that you are adding." The choices are "Include" (default) and "Exclude."

Step 2, "Select Geography Type." The geographic types "OCN" and "RateCenter" are available only to internal users working with RDD Cellular Sample Cells and are not visible outside the company firewall.

Use the search box to select a geographic target. For example, type "phil" into the search box to find the Philadelphia FIPS. When using an asterisk (*), type in "42*," for instance, to find any FIPS codes starting with "42."

Geographic Filters

Select from Genesys

Step 1: Select the type of geographic specification that you are adding

☒ Include ☐ Exclude

Step 2: Select Geography Type

FIPS 42

Step 3: Please select the geographic data that will be defined in your cell specifications:

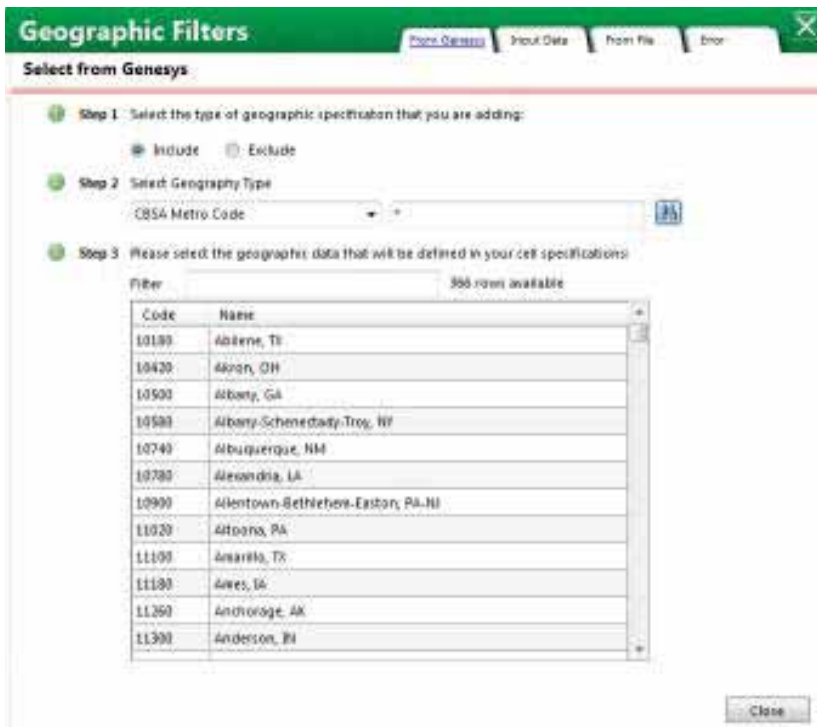
Filter: 67 rows available

Code	Name	Location
42001	Adams	PA
42003	Allegheny	PA
42005	Armstrong	PA
42007	Beaver	PA
42009	Bedford	PA
42011	Berks	PA
42013	Blair	PA
42015	Bradford	PA
42017	Bucks	PA
42019	Butler	PA
42021	Cambria	PA
42023	Cameron	PA

Close

Using the asterisk by itself lists every variable available for that level of geography. To see lists of FIPS codes, visit <http://www.m-s-g.com/We-b/genesys/resources.aspx>. Remember to click the binoculars icon to initiate a search and generate a list of results.

Step 3, "Please select the geographic data that will be defined in your cell specifications." Highlight the names you want, or enter a code into the Filter box, and then click Close to process the results.



Geographic Filters From Genesys Input Data From File Error

Select from Genesys

Step 1: Select the type of geographic specification that you are adding:
☒ Include ☐ Exclude

Step 2: Select Geography Type
CBSA Metro Code

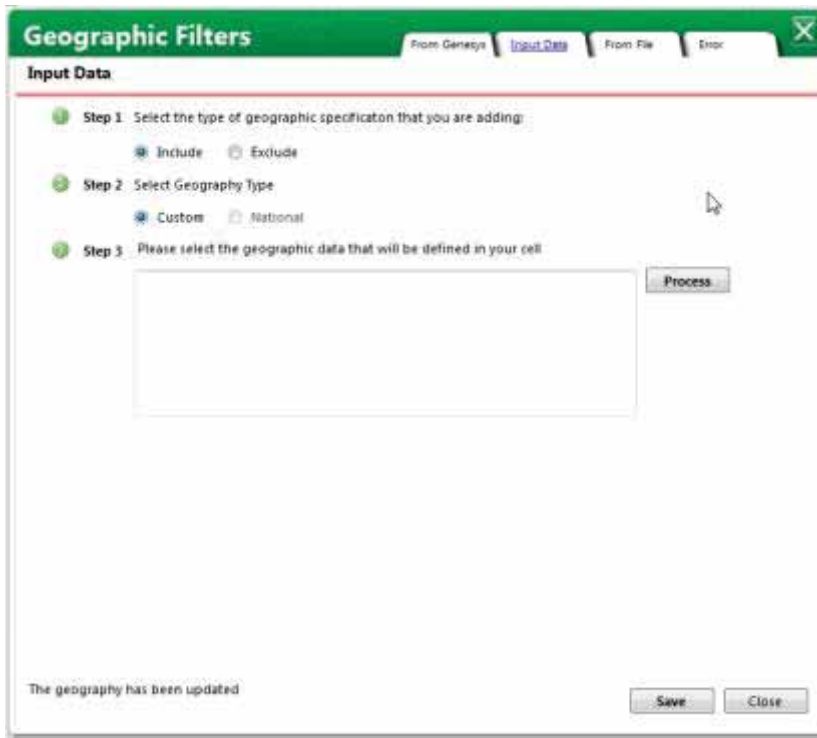
Step 3: Please select the geographic data that will be defined in your cell specifications:
Filter 396 rows available

Code	Name
10100	Abilene, TX
10400	Akron, OH
10500	Albany, GA
10600	Albany-Schenectady-Troy, NY
10740	Albuquerque, NM
10780	Alexandria, LA
10900	Allentown-Bethlehem-Easton, PA-NJ
11020	Altoona, PA
11100	Amarillo, TX
11180	Anchorage, AK
11260	Anchorage, AK
11300	Anderson, IN

Close

Input Data

To set up input data, click the Input Data tab, and configure as needed.



Geographic Filters From Genesys **Input Data** From File Error

Input Data

Step 1: Select the type of geographic specification that you are adding:
☒ Include ☐ Exclude

Step 2: Select Geography Type
☒ Custom ☐ National

Step 3: Please select the geographic data that will be defined in your cell

Process

The geography has been updated

Save Close

Step 1, "Select the type of geographic specification that you are adding." The choices are "Include" (default) and "Exclude."

Step 2, "Select Geography Type." The choices are "Custom" (default) and "National."

Step 3, "Please select the geographic data that will be defined in your cell."

Be sure to Save any changes.

Import From File

To import from a file, click the From File tab, and configure as needed.

The screenshot shows the 'Geographic Filters' dialog box with the 'Import from File' tab selected. The dialog has a green header bar with the title 'Geographic Filters' and four tabs: 'From Settings', 'Input Data', 'From File', and 'Error'. The 'Import from File' tab is active. It contains four steps: Step 1: 'Select the type of geographic specification that you are adding:' with radio buttons for 'Include' (selected) and 'Exclude'. Step 2: 'Select Geography Type:' with a dropdown menu showing 'CBSA Metro Code'. Step 3: 'Please select file to be imported:' with a text input field and a 'Browse' button. Step 4: 'Set starting position for import. View file if needed:' with a text input field containing '1' and a 'View' button. At the bottom of the dialog are 'Save' and 'Close' buttons.

Step 1, "Select the type of geographic specification that you are adding." The choices are "Include" (default) and "Exclude."

Step 2, "Select Geography Type."

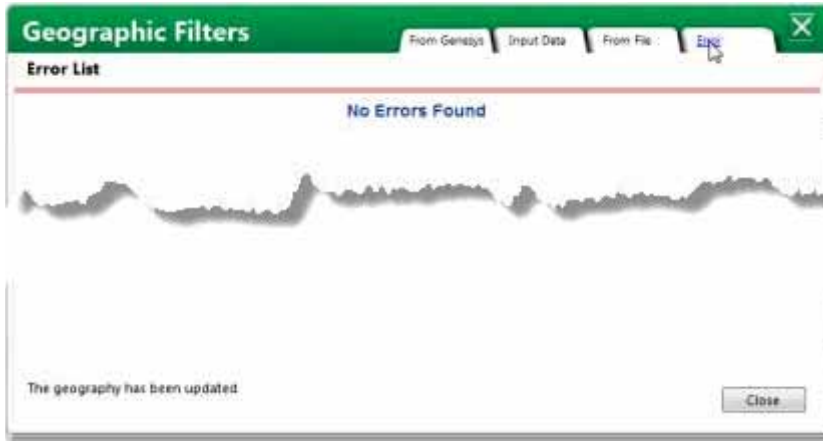
Step 3, "Please select file to be imported." Click Browse to find the file.

Step 4, "Set starting point for Import. View file if needed."

Be sure to Save any changes.

Error

To see a list of possible errors, click the Error tab.



Business Rules for RDD Geographic Data

NOTE: Small Area Geo definitions and Large Area Geo definitions apply only to Landline RDD cells.

- Small Area Geos can't be mixed with Large Area Geos (either as Include or Exclude)
- Small Area Geos can't have Demographic Data

The following Geography Types are defined as Small Area:

- Census Block Group
- Census Tract
- Congressional District
- Metropolitan MSC
- NPA
- ZIP Code

The following Geography Types are defined as Large Area:

- CBSA MCSA Code
- CBSA Metro Code
- CBSA Metro Division Code
- Census Division
- Census Region
- DMA
- DMA Rank
- FIPS
- National
- Nielsen County Size
- NPANXX
- NPANXX Bank
- NPANXX Block

- State
- Time Zone

Demographic Data

Click Demographic Data to view or modify the Demographic Filters being applied to your cell.

The Add Demographic window opens.

Add Demographic

Household Income

1 Select Household Income

- ☒ Household Income < \$15K
- ☒ Household Income \$15K < \$25K
- ☒ Household Income \$25K < \$35K
- ☒ Household Income \$35K < \$50K
- ☒ Household Income \$50K < \$75K
- ☒ Household Income \$75K < \$100K
- ☒ Household Income \$100K < \$125K
- ☒ Household Income \$125K < \$150K
- ☐ Household Income \$150K < \$200K
- ☐ Household Income \$200K < \$500K
- ☐ Household Income \$500K +

2 Define Demographic Cutoff

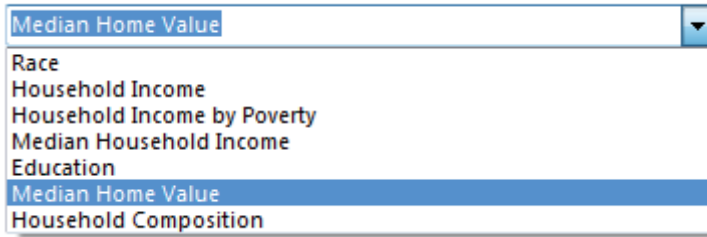
Incidence: 45 Coverage: [View Report...](#)

3 Define NPA NXX Block Cutoff

Incidence: 75 Coverage: [View Report...](#)

Save Clear Cancel

At the top of the Add Demographic window, click the list to open it and see the options available.



Notice that you can change the item displayed in the list to modify the demographic filters being used. Your options are:

- Race
- Household Income
- Household Income by Poverty
- Median Household Income
- Education
- Median Home Value
- Household Composition

A variety of choices are given under each of the options listed above. If you select Race, the list options change. If you select Education, the list options change, and so forth.

You can also use the Add Demographic window to:

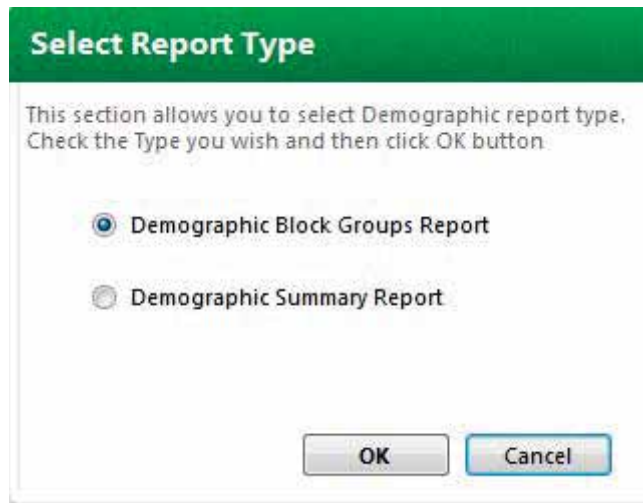
- Define Geographic Cutoff (optional)
- Define Exchange Cutoff (optional)

Define Geographic Cutoff

Under Define Geographic Cutoff (optional), the Incidence is defaulted to a certain value and Coverage is locked. Change Incidence if needed.

View Report

Click to View Report. The Select Report Type window opens. See the example below.



Select Report Type

This section allows you to select Demographic report type. Check the Type you wish and then click OK button.

☒ Demographic Block Groups Report

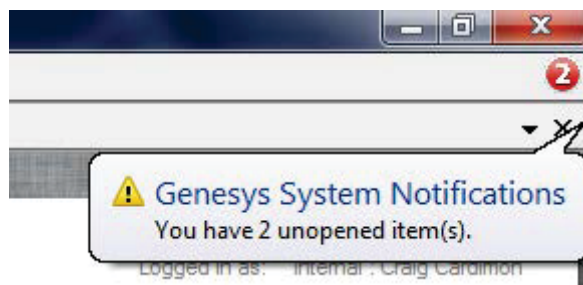
☐ Demographic Summary Report

OK Cancel

Your report type options depend on the Report Type you are requesting:

- Demographic Block Groups Report (default)
- Demographic Summary Report

Select the report you want and click OK. When your material is ready, you will receive a Genesys System Notification in the upper right corner of Genesys System.



Click the red notification to get your message.



Start Page Notifications Form

View Pending Reports

Use this section to view notifications for report and sample requests.

Logged in as: Internal : Craig Cardmon

List of Pending Messages

Project Name	Cut Name	Report Type	Date & Time	View
Change New Project	johnson	Size Coverage Report (Default)	1/29/2013 10:36:34 PM	View
Change New Project	johnson	Size Report (Default)	1/29/2013 10:36:34 PM	View

Click View to see your report. Click Edit to the right of the Cutoff (Block Group).

The screenshot shows the 'pieces' window with a green header. On the left is a sidebar with 'I want to...' and various options like 'Define Frame', 'Generation Options', 'Output Options', and 'Reports Options'. The main area is titled 'Cell Details' and shows information for a cell named 'pieces'. It includes a 'Geographic Area' section with 'CBSA Code' and 'Demographic Area: Household Income'. A table shows 'Household Income Range' with 'Incidence' and 'Coverage' values. A red arrow points to the 'View Report...' link in the 'Coverage' column. At the bottom, there are 'Save' and 'Edit' buttons.

Cutoff	(Block Group)	Incidence	Coverage	
Cutoff	(Block Group)	45%	N/A	View...
Cutoff	(NPA 100 Block)	75%	N/A	View...

The Add Demographic window opens again. See "RDD Cellular Sample Cell" on page 36

The screenshot shows the 'Add Demographic' window with a green header. It has a 'Race' dropdown menu. Below it is a 'Select Race' section with checkboxes for 'Hispanic/Latino', 'White', 'Black/African American', 'American Indian/Alaskan Native', 'Asian', 'Native Hawaiian/Pacific Islander', 'Some Other Race', and 'Two or More Races'. The 'Two or More Races' checkbox is checked. Below this is a 'Define Demographic Cutoff' section with 'Incidence' and 'Coverage' input fields. A red arrow points to the 'View Report...' link next to the 'Coverage' field. At the bottom are 'Save', 'Clear', and 'Cancel' buttons.

Define Demographic Cutoff

Incidence	Coverage	
0	100	View Report...

Under Define Demographic Cutoff, click View Report. The Select Report Type window opens.

Select Report Type

This section allows you to select Demographic report type. Check the Type you wish and then click OK button.

☐ Demographic Block Groups Report
☒ Demographic Summary Report

OK Cancel

Select Demographic Summary Report, then click OK.

Set Cutoff for Race Summary

0 % 100 %

Coverage 100%
Cumulative 100%

Incidence 0%
Cumulative 92%

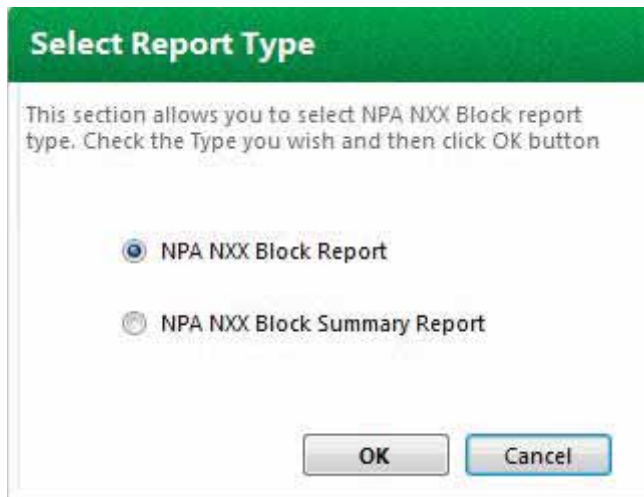
Block Groups 141 Included 141 Excluded 0
Target: Hispanic/Latino, White, Two or More Races

Percent	Block Groups	Total Individual Population	Total Cumulative Population	Target Individual Population	Target Cumulative Population	Individual Incidence	Cumulative Incidence	Coverage
100	0	0	0	0	0	0	0	0
95	49	57013	57013	55535	55535	97	97	37
90	48	57323	114336	53253	108788	93	95	73
85	24	28863	143199	25298	134086	88	94	90
80	12	11883	155082	9785	143871	82	93	96
75	2	1834	156916	1426	145297	78	93	97
70	2	2507	159423	1806	147103	72	92	98
65	3	2177	161550	1444	148547	68	92	99
60	1	1302	162852	824	149371	63	92	100
55	0	0	162852	0	149371	0	92	100
50	0	0	162852	0	149371	0	92	100
45	0	0	162852	0	149371	0	92	100
40	0	0	162852	0	149371	0	92	100
35	0	0	162852	0	149371	0	92	100
30	0	0	162852	0	149371	0	92	100
25	0	0	162852	0	149371	0	92	100

Save Print Cancel

Note the slider running across the top of the window. It is set at 100%, which is reflected in the Coverage statement on the window. As you move the slider to the left, decreasing the Coverage from 100%, the Coverage statement changes accordingly.

Go back to the Add Demographic window. Under Define NPA NXX Block Cutoff, click View Report. The Select Report Type window opens.

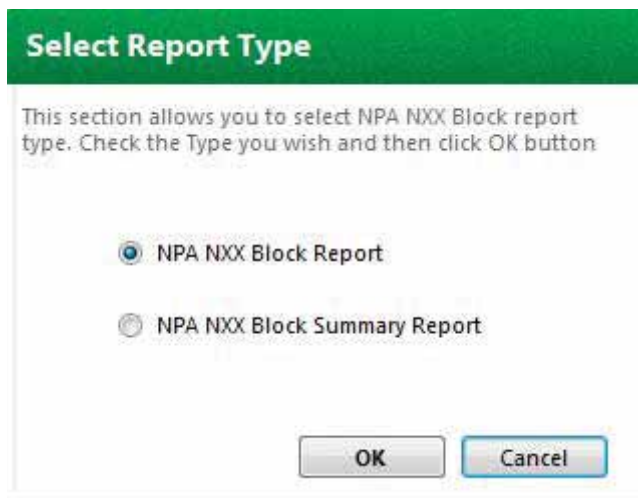


The dialog box has a green header bar with the text "Select Report Type". Below the header, there is a paragraph of text: "This section allows you to select NPA NXX Block report type. Check the Type you wish and then click OK button". Underneath this text, there are two radio button options. The first option is "NPA NXX Block Report" and it is selected, indicated by a blue dot. The second option is "NPA NXX Block Summary Report" and it is not selected, indicated by a grey dot. At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

Select NPA NXX Block Report, then click OK to submit your report.

Define Exchange Cutoff

Your options under Define Exchange Cutoff (optional) are defaulted to a certain Incidence and Coverage. Change these if needed. Then click to View Report. The Select Report Type window opens.

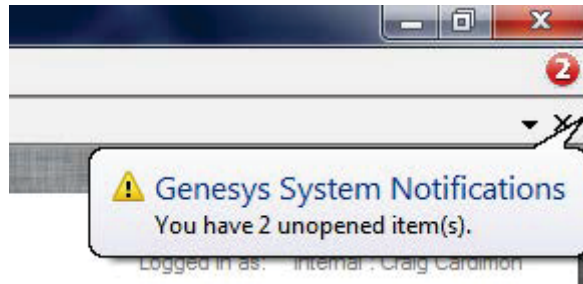


This is a duplicate of the dialog box shown in the previous image. It has a green header bar with the text "Select Report Type". Below the header, there is a paragraph of text: "This section allows you to select NPA NXX Block report type. Check the Type you wish and then click OK button". Underneath this text, there are two radio button options. The first option is "NPA NXX Block Report" and it is selected, indicated by a blue dot. The second option is "NPA NXX Block Summary Report" and it is not selected, indicated by a grey dot. At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

Your report type options here are:

- NPA NXX Block Report (default)
- NPA NXX Block Summary Report

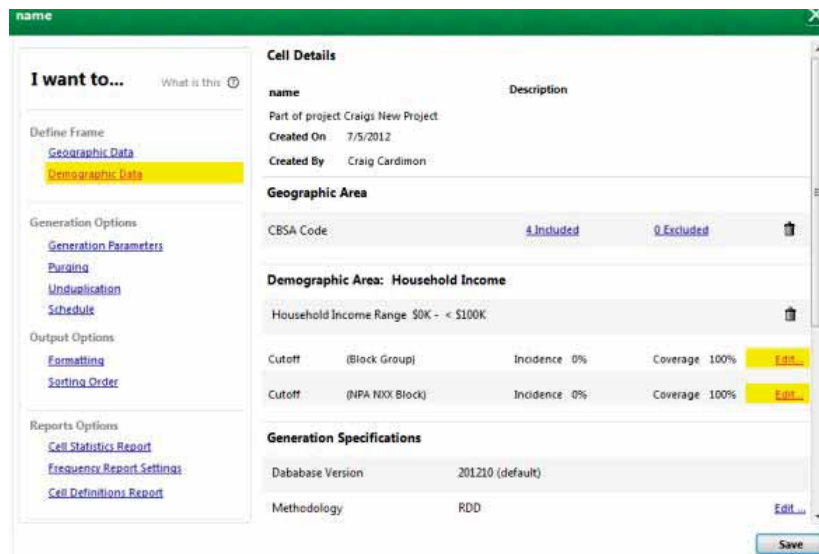
Select the report you want and click OK. Again, when your material is ready, you will receive a Genesys System Notification in the upper right corner of Genesys System.



Click the red notification to get your message.

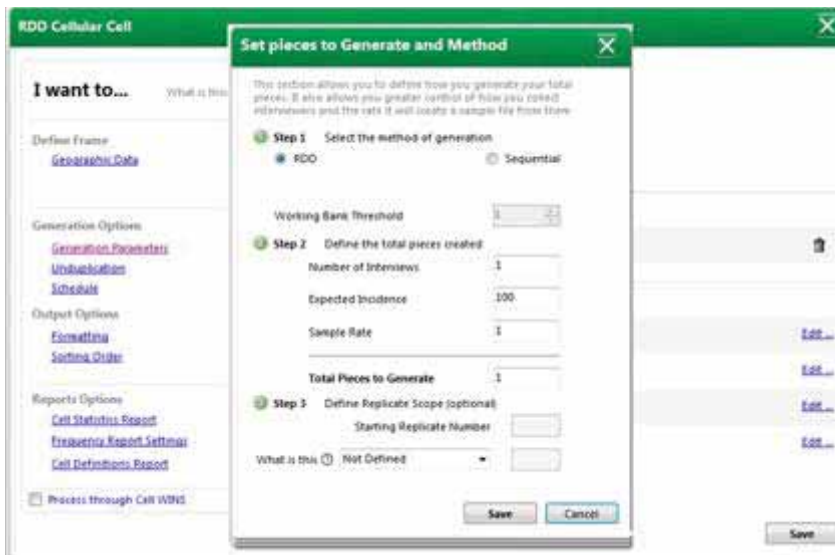


Click View to see your report.



Generation Parameters

Click Generation Parameters to view or modify how you are generating sample. The "Set pieces to Generate and Method" window opens.



In Step 1, select the method of generation. Your options are:

- RDD
- Sequential (not available for users outside the MSG firewall)

In Step 2, "Define the total pieces created." Type in the:

- Number of Interviewers
- Expected Incidence
- Sample Rate
- Total Pieces to Generate

In Step 3, "Define Replicate Scope (optional)." Type in the Starting Replicate Number. From the list, select one of these options:

- Not Defined (default selection) -- NOTE: If you select "Not Defined," then the Starting Replicate Number and the number box for the Number of Replicates will be disabled.)
- Number of Replicates
- Numbers per Replicate

Save any changes.

RDD Generation Parameter Notes

Number of Interviews: This is the number of interviews completed, or quota of completes, for this cell. This number must be greater than or equal to 1.

Expected Incidence: This is the estimated percent of household contacts that will qualify for the survey based on any screening process in the survey. The incidence rate is entered as a whole number with up to one decimal place. Accepted ranges are 0.5 to 100.0.

Sample Rate: This is the number of sample pieces needed to obtain a completed screen. A "screen" is defined as someone who will answer your qualifying questions, even though they may not qualify for the survey.

Note: Genesys uses the following equation to calculate the number of pieces to generate:

$$(\text{Number of Interviews} / \text{Expected Incidence}) * \text{Sample Rate} = \text{Number of Pieces}$$

The number of interviews divided by the expected incidence multiplied by the sample rate equals the number of pieces to generate. This is the equation the software uses to generate the sample. The calculation used to determine the number of pieces to generate is based solely on the information supplied by the user.

Many users may already know the number of pieces they require before reaching this point. To default the system to generate the number of pieces desired, set the number of interviews equal to the pieces wanted, and set the expected incidence to 100 and the sample rate to 1.

Number of Reps (Replicates): A replicate is a representative subset of the entire

sample file, where each of these subsets is representative of the original sample file. For example, if 10% of your entire sample file was in California, then 10% of the phone number in each replicate will also be in California.

The number of replicates is entered as a whole number (no decimals). Accepted ranges are 1 to 999.

The number of replicates entered must be less than or equal to the number of pieces that will be generated.

Starting Replicate: The Starting Replicate number default is 1, and unless you change this, the replicate number assignment will begin with 1. For example, if the number of replicates specified is 10 and the starting replicate number is 1, then the sample will be put in 10 replicates numbered 1 to 10.

Another example, if the number of replicates specified is 10, but the starting replicate number is set to 5, then the sample file will be put into 10 replicates numbered 5 to 14. This option to change the starting replicate number is valuable when generating additional sample for a particular cell.

Purging

Click Purging to open the Specifying Purging Options window.



Use this window to select the data sets for purging your generated data against. Your options are:

- Remove Known Businesses (default choice)
- Purge Against NeuStar Data (Requires a NeuStar License)
- Replace the purged numbers

Unduplication

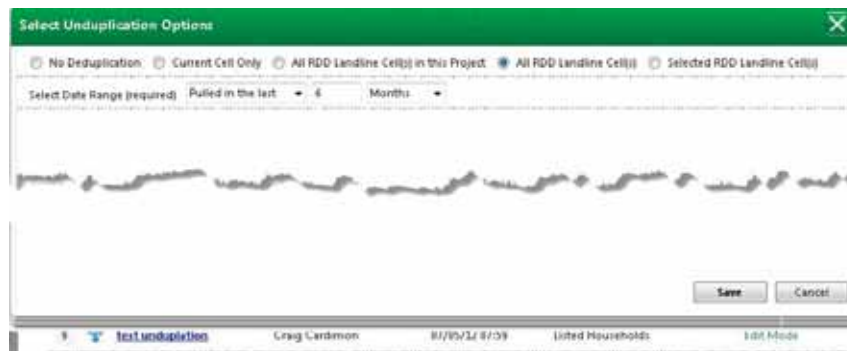
Click Unduplication. The Select Unduplication Options window opens.



Your options are:

- No Deduplication (default choice)
- Current Cell Only
- All RDD Cells in this Project
- All RDD Landline Cells
- Selected RDD Landline Cells

If you select All RDD Landline Cells, more options appear.



You need to Select Date Range. This is required. The default is "Pulled in the last 6 Months." You may modify this.

Your choices for pulling are:

- Pulled in the last
- Pulled between

Type in your choice for the amount of time. This is defaulted to "6."

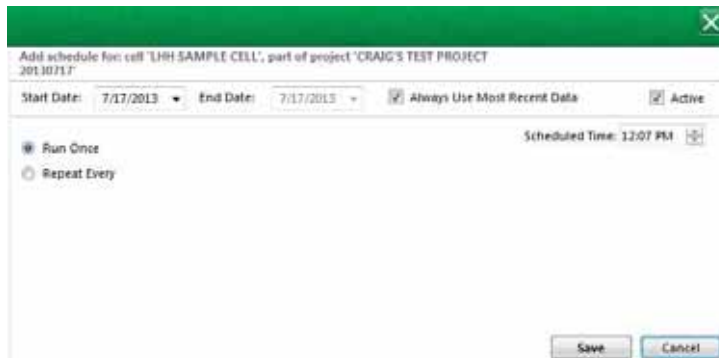
Your choices for measuring the length of time are:

- Days
- Months (default)
- Years

Remember to Save any changes.

Schedule

Click Schedule.

A screenshot of a software dialog box titled "Add schedule for cell 'LHH SAMPLE CELL', part of project 'CRAIG'S TEST PROJECT 20130717'". The dialog has a green header bar with a close button (X). Below the title bar, there are fields for "Start Date" (7/17/2013) and "End Date" (7/17/2013), both with dropdown arrows. To the right of these fields are two checkboxes: "Always Use Most Recent Data" (checked) and "Active" (checked). Below these fields, there are two radio buttons: "Run Once" (selected) and "Repeat Every". To the right of the radio buttons, there is a "Scheduled Time" field showing "12:07 PM" with a dropdown arrow. At the bottom right of the dialog are two buttons: "Save" and "Cancel".

Your options are:

- Start Date
- End Date
- Always Use Most Recent Data
- Active
- Run Once or Repeat Every

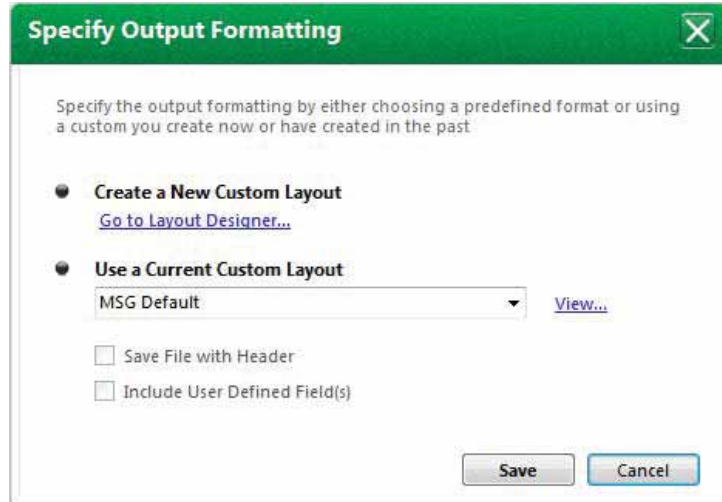
If you select "Repeat Every," more options appear. You will need to select how many times to run the job (1-12), and a time span of Days, Weeks, or Months.

A screenshot showing the "Repeat Every" section of the dialog box. It features a radio button labeled "Repeat Every" which is selected. To its right is a dropdown menu showing the number "1" with a downward arrow. Further right is another dropdown menu labeled "Day(s)" with a downward arrow.

Click Save to preserve any changes, then click Close.

Formatting

Click Formatting.



Use the Specify Output Formatting window to configure the output formatting. Select either a new custom layout, or choose from a list of current custom layouts.

Create a New Custom Layout

If you choose to Create a New Custom Layout, click Go to Layout Designer to build your new layout. The Add New Sample Layout window opens.

Add New Sample Layout

This editor allows you to create a custom output layout. Name the layout so you can find and reuse it easily.

Layout Name: **DB Type:** RED (Landline) Sample

Output Delimiter:

☒ Fixed Width ☐ Comma ☐ Semicolon ☐ Tab ☐ Space ☐ Other

Available Fields: ☐ Show RDD Fields only

Length	Field Name
10	Phone Number
1	Time Zone
1	Replicate
1	Unit
5	Assignments
5	Total Pop
5	Percent Listed
5	Household Density
5	FIPS
2	State
30	City
5	CBSA Code
1	Metropolitan
1	Microropolitan
4	MSA
1	Met Status

Output Order

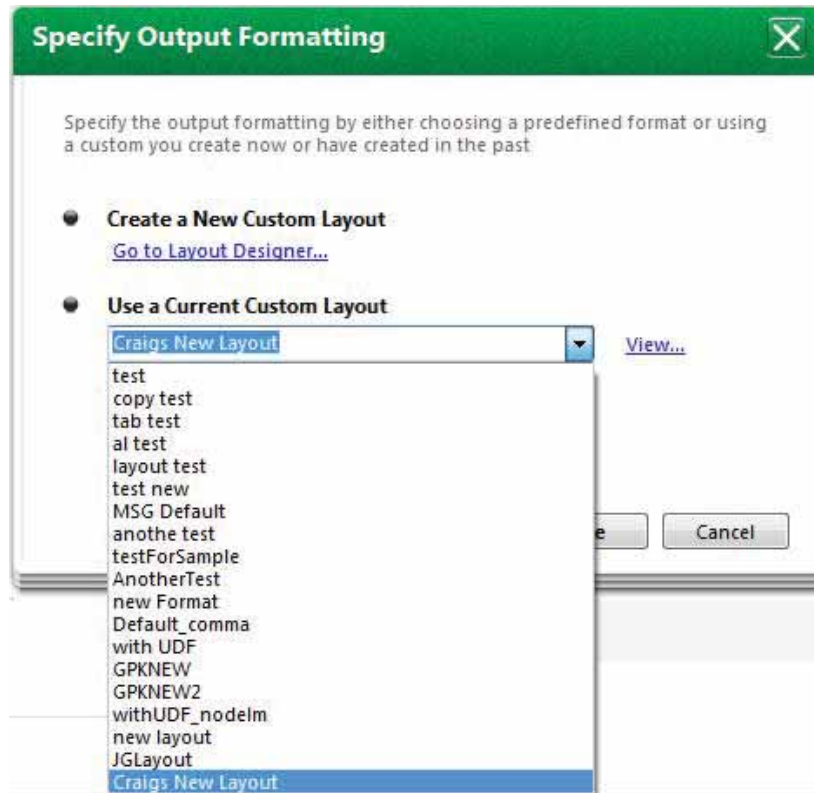
Field Name	Start	End
------------	-------	-----

Type in a name for the layout and configure as needed. Your choices under Output Delimiter are:

- Fixed Width (default choice)
- Comma
- Semicolon
- Tab
- Space
- Other

Drag entries from Available Fields on the left, to Output Order on the right. Remember to Save any changes.

If you create a New Custom Layout, that layout becomes the default option shown in the Use a Current Custom Layout list in the Specify Output Formatting window. If you create a custom layout but decide not to use it right away, click the list, as shown in the screen shot below, and choose another layout.




The options to Save File with Header and Include User Defined Fields will be available if the layout calls for those options, otherwise they remain unavailable.

Use a Current Custom Layout

Click the list as shown in the screen shot above, select a layout, and click View. A report is generated using the layout you specified.

Sorting Order

Click Sorting Order. The Specify Sorting Order window opens.

Specify Sorting Order 

This section allows you to select order of the fields being output for this cell. Check the fields you wish to sort and then drag them in order you wish to sort by

	Field Name	
<input type="checkbox"/>	CBSA Code	
<input type="checkbox"/>	CBSA Div Code	
<input type="checkbox"/>	Census Division	
<input type="checkbox"/>	Census Region	
<input type="checkbox"/>	Daylight Savings	
<input type="checkbox"/>	DMA	
<input type="checkbox"/>	DMA Rank	
<input type="checkbox"/>	DMA Size	
<input type="checkbox"/>	FIPS	
<input type="checkbox"/>	Met Status	
<input type="checkbox"/>	Metropolitan	
<input type="checkbox"/>	Micropolitan	
<input type="checkbox"/>	Replicate	

☐ Randomize Order

Save

Cancel

Select the fields in the order you want to sort by, and the fields will automatically rearrange themselves.

Specify Sorting Order

This section allows you to select order of the fields being output for this cell. Check the fields you wish to sort and then drag them in order you wish to sort by.

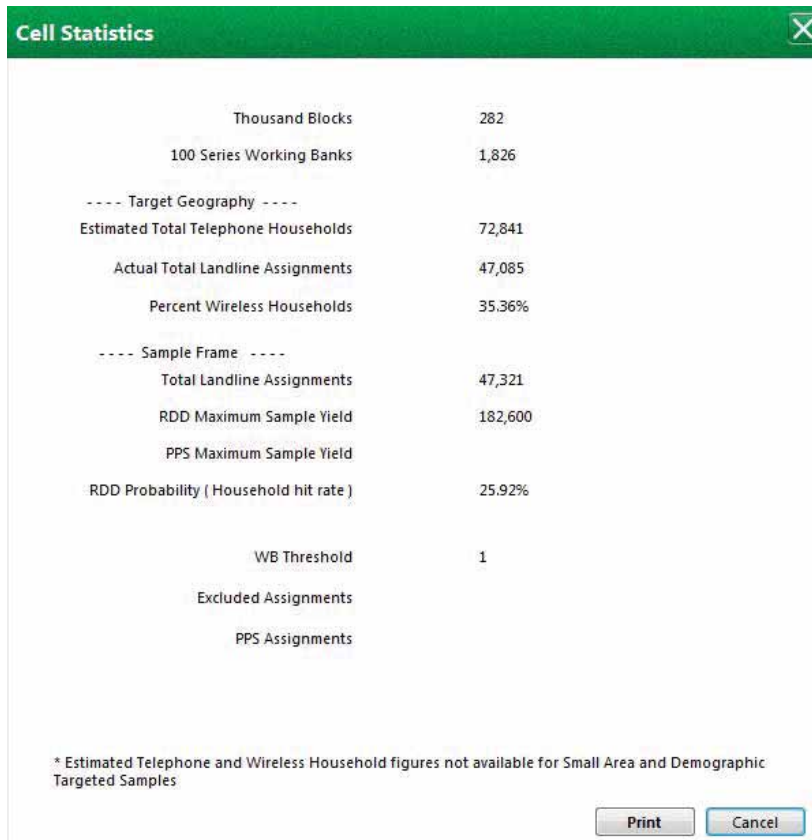
Field Name			
<input checked="" type="checkbox"/>	CBSA Code		1
<input checked="" type="checkbox"/>	Census Division		2
<input checked="" type="checkbox"/>	Census Region		3
<input checked="" type="checkbox"/>	Daylight Savings		4
<input checked="" type="checkbox"/>	DMA		5
<input type="checkbox"/>	CBSA Div Code		
<input type="checkbox"/>	DMA Rank		
<input type="checkbox"/>	DMA Size		
<input type="checkbox"/>	FIPS		
<input type="checkbox"/>	Met Status		
<input type="checkbox"/>	Metropolitan		
<input type="checkbox"/>	Micropolitan		
<input type="checkbox"/>	Replicate		

☐ Randomize Order**Save****Cancel**

Remember to Save your work.

Cell Statistics Report

Click Cell Statistics Report. The Cell Statistics window opens.



The screenshot shows a window titled "Cell Statistics" with a green header bar. The window contains a list of statistics and their values, organized into sections separated by dashed lines. At the bottom, there is a note about estimated figures and two buttons: "Print" and "Cancel".

Statistic	Value
Thousand Blocks	282
100 Series Working Banks	1,826
---- Target Geography ----	
Estimated Total Telephone Households	72,841
Actual Total Landline Assignments	47,085
Percent Wireless Households	35.36%
---- Sample Frame ----	
Total Landline Assignments	47,321
RDD Maximum Sample Yield	182,600
PPS Maximum Sample Yield	
RDD Probability (Household hit rate)	25.92%
WB Threshold	1
Excluded Assignments	
PPS Assignments	

* Estimated Telephone and Wireless Household figures not available for Small Area and Demographic Targeted Samples

Print Cancel

The cell statistics reported here are:

Working Banks	RDD Probability (Household Hitrate)
Landline Assignments	PPS Probability (Household Hitrate)
Estimated Telephone Households	WB Threshold
Estimated Cell Only Households	Excluded Assignments
Maximum Sample Yield	PPS Assignments

The PPS Probability Household Hitrate and PPS Assignments fields are populated only if a PPS sample is created. Therefore, if you have a new cell and you run a "Cell Statistics Report," these fields will not be populated. If you pick "Cell Statistics Report" for a cell that used the PPS Method of Generation and has already generated a sample and none of the specifications have changed, you can see numbers in this report.

Frequency Report Settings

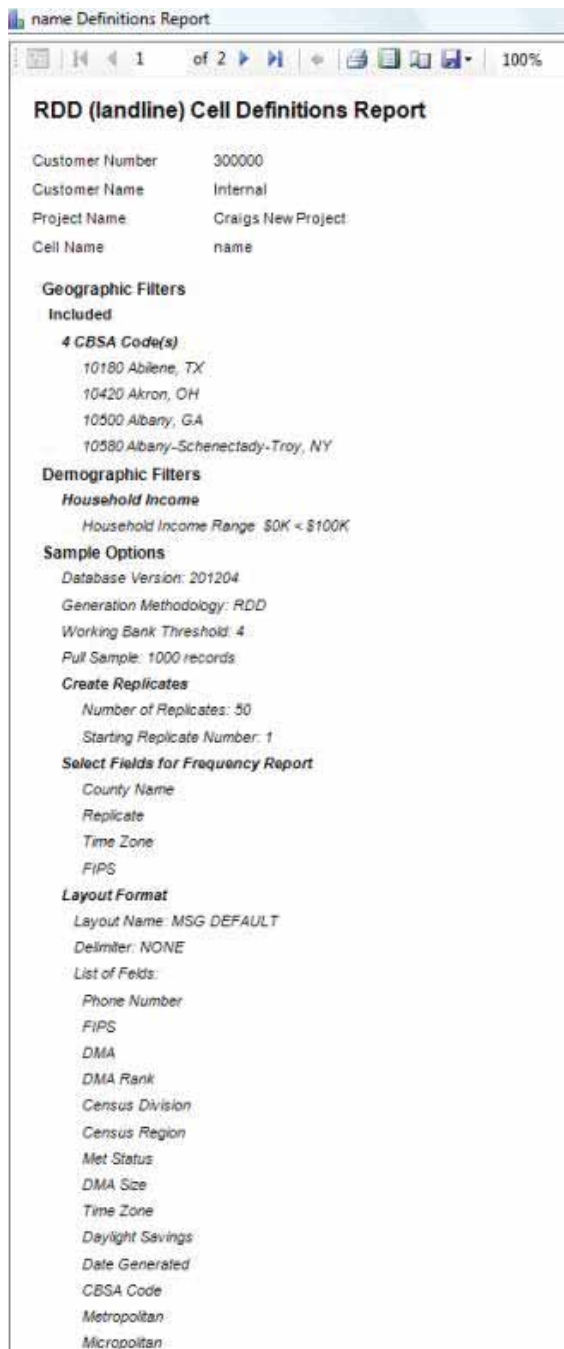
Click Frequency Report Settings. The Frequency Fields Selection window opens, displaying the frequencies being applied to your cell.



Modify as needed and then Save.

Cell Definitions Report

Click Cell Definitions Report. The definitions report for your cell opens.



name Definitions Report

1 of 2 100%

RDD (landline) Cell Definitions Report

Customer Number: 300000
Customer Name: Internal
Project Name: Craigs New Project
Cell Name: name

Geographic Filters
Included
4 CBSA Code(s)
10180 Abilene, TX
10420 Akron, OH
10500 Albany, GA
10580 Albany-Schenectady-Troy, NY

Demographic Filters
Household Income
Household Income Range: \$0K < \$100K

Sample Options
Database Version: 201204
Generation Methodology: RDD
Working Bank Threshold: 4
Full Sample: 1000 records

Create Replicates
Number of Replicates: 50
Starting Replicate Number: 1

Select Fields for Frequency Report
County Name
Replicate
Time Zone
FIPS

Layout Format
Layout Name: MSG DEFAULT
Delimiter: NONE
List of Fields:
Phone Number
FIPS
DMA
DMA Rank
Census Division
Census Region
Met Status
DMA Size
Time Zone
Daylight Savings
Date Generated
CBSA Code
Metropolitan
Micropolitan

Edit

On the right side of the RDD window you can see the:


- Cell Details
- Geographic Area
- Demographic Area
- Generation Specifications

Use the Edit links under "Demographic Area" and under "Generation Specifications" to make modifications.

The details of your cell are listed under Cell Details.


Under Geographic Area, you can see the geographic filters that are being applied to your cell. In this example in the screen shot above, you see "CBSA Code."

Geographic Area

CBSA Code [4 Included](#) [0 Excluded](#) 

Links for the included and excluded codes are adjacent. To see the included codes in this example, you would click the link "4 Included." See the screen shot below.



Save the codes as a text file or print them if need be. Delete the codes altogether by clicking the trash icon .

If you chose Household Income as a filter, under Demographic Area, you see the household income filters that are being applied to your cell and edit these as needed.

Demographic Area: Household Income

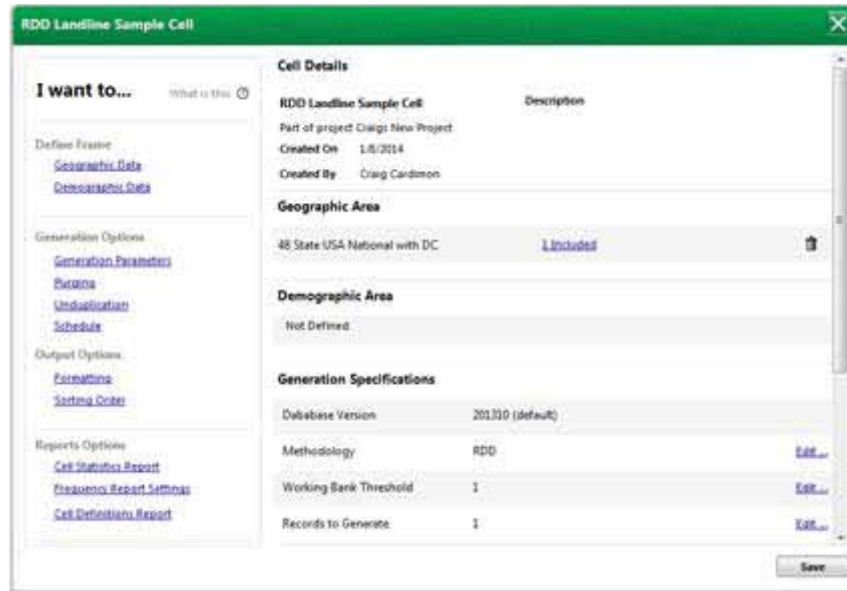
Household Income Range: \$0K < \$35K 				
Cutoff	(Block Group)	Incidence	51%	Coverage 40% Edit...
Cutoff	(NPANXX)	Incidence	42%	Coverage 30% Edit...

To define your frame by geography, click Geographic Data.

To define your frame by demography, click Demographic Data.

RDD Landline Sample Cell

Use the RDD cell editor that opens when you create an RDD Landline Sample Cell to define your frame, modify your generation options, change your output options, and set your report options.



On the left side of the window, the "I want to" section contains many options:

Under Define Frame, your choices are:

- Geographic Data
- Demographic Data

Under Generation Options, your choices are:

- Generation Parameters
- Purging
- Unduplication
- Schedule

Under Output Options, your choices are:

- Formatting
- Sorting Order

Under Reports Options, your choices are:

- Cell Statistics Report
- Frequency Report Settings
- Cell Definitions Report

On the right side of the window under Cell Details are more options:

Under Geographic Area, you see the codes you used. Click the links see the codes included and excluded.

Under Demographic Area, you see the demographics you used. Click Edit to modify these.

Under Generation Specifications, you see the Database Version and Methodology used. Click Edit to modify.

Geographic Data

Click Geographic Data to view or modify the Geographic Filters being applied to your cell.

From Genesys

The Geographic Filters window opens to the From Genesys tab.

The screenshot shows the 'Geographic Filters' window with the 'From Genesys' tab selected. The window has a green header bar with the title 'Geographic Filters' and a close button. Below the header, there are four tabs: 'From Genesys', 'Input Data', 'From File', and 'Error'. The 'From Genesys' tab is active. The main content area is titled 'Select from Genesys' and contains three steps:

- Step 1:** Select the type of geographic specification that you are adding:
 ☒ Include ☐ Exclude
- Step 2:** Select Geography Type:
 A dropdown menu shows '2000 Census Block'.
- Step 3:** Please select the geographic data that will be defined in your cell specifications:
 A text input field labeled 'Filter' is present, followed by a large empty rectangular box for selection.

At the bottom of the window, there is a status bar that says 'The geography(s) have been updated' and a 'Close' button.

Work through the tabs from left to right:

- From Genesys
- Input Data (hand entering)
- Import From File

Step 1, "Select the type of geographic specification that you are adding." The choices are "Include" (default) and "Exclude."

Step 2, "Select Geography Type."

Use the search box to select a geographic target. For example, type "phil" into the search box to find the Philadelphia FIPS. When using an asterisk (*), type in "42*," for instance, to find any FIPS codes starting with "42."

Geographic Filters

Select from Genesys

Step 1: Select the type of geographic specification that you are adding:
☒ Include ☐ Exclude

Step 2: Select Geography Type:
 FIPS

Step 3: Please select the geographic data that will be defined in your cell specifications:

Filter 67 rows available

Code	Name	Location
42001	Adams	PA
42003	Allegheny	PA
42005	Armstrong	PA
42007	Beaver	PA
42009	Bedford	PA
42011	Berks	PA
42013	Blair	PA
42015	Bradford	PA
42017	Bucks	PA
42019	Butler	PA
42021	Cambridge	PA
42023	Cameron	PA

Close

Using the asterisk by itself lists every variable available for that level of geography. To see lists of FIPS codes, visit <http://www.m-s-g.com/Web/genesys/resources.aspx>. Remember to click the binoculars icon to initiate a search and generate a list of results.

Step 3, "Please select the geographic data that will be defined in your cell specifications." Highlight the names you want, or enter a code into the Filter box, and then click Close to process the results.

Geographic Filters From Genesys Input Data From File Error

Select from Genesys

Step 1: Select the type of geographic specification that you are adding:
☒ Include ☐ Exclude

Step 2: Select Geography Type
CBSA Metro Code

Step 3: Please select the geographic data that will be defined in your cell specifications:
Filter 396 rows available

Code	Name
10100	Abilene, TX
10400	Akron, OH
10500	Albany, GA
10600	Albany-Schenectady-Troy, NY
10740	Albuquerque, NM
10780	Alexandria, LA
10900	Allentown-Bethlehem-Easton, PA-NJ
11020	Altoona, PA
11100	Amarillo, TX
11180	Anchorage, AK
11260	Anchorage, AK
11300	Anderson, IN

Close

Input Data

To set up input data, click the Input Data tab, and configure as needed.

Geographic Filters From Genesys Input Data From File Error

Input Data

Step 1: Select the type of geographic specification that you are adding:
☒ Include ☐ Exclude

Step 2: Select Geography Type
☒ Custom ☐ National

Step 3: Please select the geographic data that will be defined in your cell

Process

The geography has been updated

Save Close

Step 1, "Select the type of geographic specification that you are adding." The choices are "Include" (default) and "Exclude."

Step 2, "Select Geography Type." The choices are "Custom" (default) and "National."

Step 3, "Please select the geographic data that will be defined in your cell."

Be sure to Save any changes.

Import From File

To import from a file, click the From File tab, and configure as needed.

The screenshot shows the 'Geographic Filters' dialog box with the 'Import from File' tab selected. The dialog has a green header bar with the title 'Geographic Filters' and four tabs: 'From Settings', 'Input Data', 'From File', and 'Error'. The 'From File' tab is active. Below the header, the 'Import from File' section contains four steps: Step 1: 'Select the type of geographic specification that you are adding:' with radio buttons for 'Include' (selected) and 'Exclude'. Step 2: 'Select Geography Type:' with a dropdown menu showing 'CBSA Metro Code'. Step 3: 'Please select file to be imported:' with a text input field and a 'Browse' button. Step 4: 'Set starting position for import. View file if needed:' with a text input field containing '1' and a 'View' button. At the bottom of the dialog are 'Save' and 'Close' buttons.

Step 1, "Select the type of geographic specification that you are adding." The choices are "Include" (default) and "Exclude."

Step 2, "Select Geography Type."

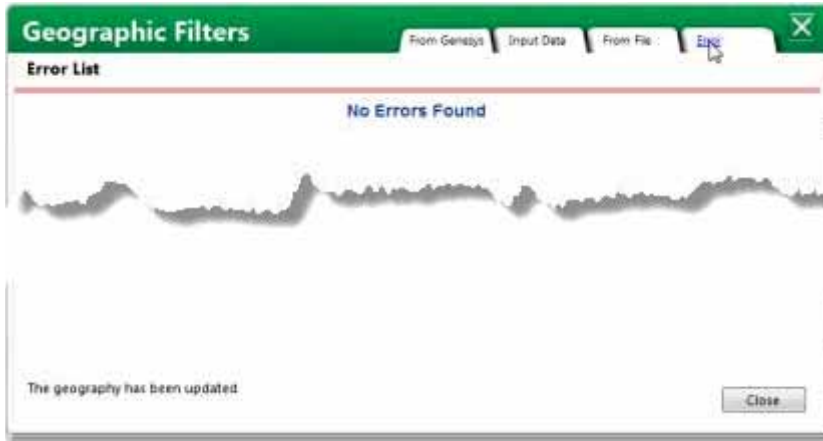
Step 3, "Please select file to be imported." Click Browse to find the file.

Step 4, "Set starting point for Import. View file if needed."

Be sure to Save any changes.

Error

To see a list of possible errors, click the Error tab.



Business Rules for RDD Landline Geographic Data

NOTE: Small Area Geo definitions and Large Area Geo definitions apply only to Landline RDD cells.

- Small Area Geos can't be mixed with Large Area Geos (either as Include or Exclude)
- Small Area Geos can't have Demographic Data

The following Geography Types are defined as Small Area:

- Census Block Group
- Census Tract
- Congressional District
- Metropolitan MSC
- NPA
- ZIP Code

The following Geography Types are defined as Large Area:

- CBSA MCSA Code
- CBSA Metro Code
- CBSA Metro Division Code
- Census Division
- Census Region
- DMA
- DMA Rank
- FIPS
- National
- Nielsen County Size
- NPANXX
- NPANXX Bank
- NPANXX Block

- State
- Time Zone

Demographic Data

Click Demographic Data to view or modify the Demographic Filters being applied to your cell. This is available for RDD Landline only. This is not available for RDD Cellular.

The Add Demographic window opens.

Add Demographic

Household Income

1 Select Household Income

- ☒ Household Income < \$15K
- ☒ Household Income \$15K < \$25K
- ☒ Household Income \$25K < \$35K
- ☒ Household Income \$35K < \$50K
- ☒ Household Income \$50K < \$75K
- ☒ Household Income \$75K < \$100K
- ☒ Household Income \$100K < \$125K
- ☒ Household Income \$125K < \$150K
- ☐ Household Income \$150K < \$200K
- ☐ Household Income \$200K < \$500K
- ☐ Household Income \$500K +

2 Define Demographic Cutoff

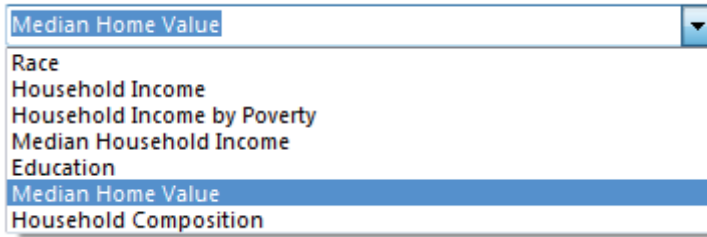
Incidence: 45 Coverage: [View Report...](#)

3 Define NPA NXX Block Cutoff

Incidence: 75 Coverage: [View Report...](#)

Save Clear Cancel

At the top of the Add Demographic window, click the list to open it and see the options available.



Notice that you can change the item displayed in the list to modify the demographic filters being used. Your options are:

- Race
- Household Income
- Household Income by Poverty
- Median Household Income
- Education
- Median Home Value
- Household Composition

A variety of choices are given under each of the options listed above. If you select Race, the list options change. If you select Education, the list options change, and so forth.

You can also use the Add Demographic window to:

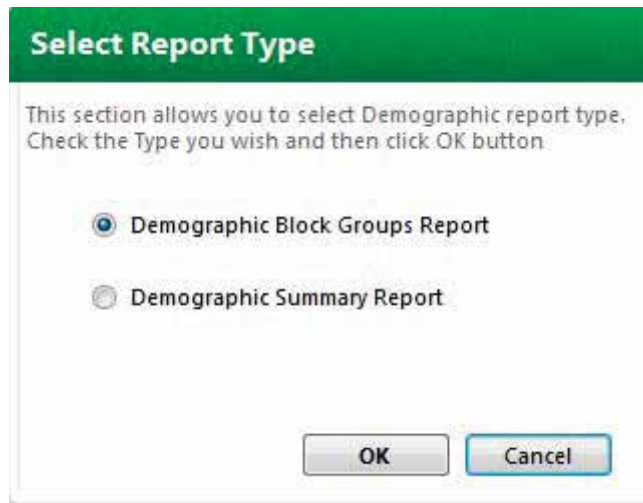
- Define Geographic Cutoff (optional)
- Define Exchange Cutoff (optional)

Define Geographic Cutoff

Under Define Geographic Cutoff (optional), the Incidence is defaulted to a certain value and Coverage is locked. Change Incidence if needed.

View Report

Click to View Report. The Select Report Type window opens. See the example below.



Select Report Type

This section allows you to select Demographic report type. Check the Type you wish and then click OK button.

☒ Demographic Block Groups Report

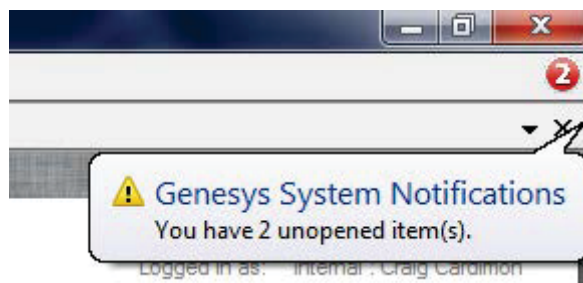
☐ Demographic Summary Report

OK Cancel

Your report type options depend on the Report Type you are requesting:

- Demographic Block Groups Report (default)
- Demographic Summary Report

Select the report you want and click OK. When your material is ready, you will receive a Genesys System Notification in the upper right corner of Genesys System.



Click the red notification to get your message.



Start Page Notifications Form

View Pending Reports

Use this section to view notifications for report and sample requests.

Logged in as: Internal : Craig Cardmon

List of Pending Messages

Project Name	Cut Name	Report Type	Date & Time	View
Change New Project	johnson	Size Coverage Report (Default)	1/29/2013 10:36:34 PM	View
Change New Project	johnson	Size Report (Default)	1/29/2013 10:36:34 PM	View

Click View to see your report. Click Edit to the right of the Cutoff (Block Group).

The 'pieces' window displays configuration for a demographic area. On the left, a sidebar lists options: 'I want to...' (with 'What is this?' link), 'Define Frame' (with 'Geographic Data' and 'Demographic Data' links), 'Generation Options' (with 'Generation Parameters', 'Params', 'Unsubstitution', and 'Schedule' links), 'Output Options' (with 'Formatting' and 'Settings Order' links), and 'Reports Options' (with 'Cell Statistics Report', 'Frequency Report Settings', and 'Cell Definitions Report' links). The main area is titled 'Cell Details' and shows 'pieces' as the description. It lists 'Part of project: Craig's New Project', 'Created On: 7/10/2012', and 'Created By: Alex Levitz'. Under 'Geographic Area', it shows 'CBSA Code' with '3 Included' and '0 Excluded' counts. The 'Demographic Area: Household Income' section shows a 'Household Income Range: \$0K - < \$150K'. Below this is a table with two rows: 'Cutoff (Block Group)' with 'Incidence: 45%' and 'Coverage: N/A', and 'Cutoff (NPA 10XX Block)' with 'Incidence: 75%' and 'Coverage: N/A'. A red arrow points to the 'View Report...' link in the first row. The 'Generation Specifications' section shows 'Database Version: 201210 (default)' and 'Methodology: RDD'. At the bottom are 'Edit...' and 'Save' buttons.

The Add Demographic window opens again.

The 'Add Demographic' window has a green header with a close button. It features a 'Race' dropdown menu. Below it, the 'Select Race' section lists several options with checkboxes: 'Hispanic/Latino' (checked), 'White' (checked), 'Black/African American' (unchecked), 'American Indian/Alaskan Native' (unchecked), 'Asian' (unchecked), 'Native Hawaiian/Pacific Islander' (unchecked), 'Some Other Race' (unchecked), and 'Two or More Races' (checked). The 'Define Demographic Cutoff' section (step 2) has 'Incidence' and 'Coverage' input fields, both set to 0 and 100 respectively. A red arrow points to the 'View Report...' link next to the 'Coverage' field. The 'Define NPA NXX Block Cutoff' section (step 3) also has 'Incidence' and 'Coverage' input fields, both set to 0 and 100 respectively, with a 'View Report...' link next to the 'Coverage' field. At the bottom are 'Save', 'Clear', and 'Cancel' buttons.

Under Define Demographic Cutoff, click View Report. The Select Report Type window opens.

Select Report Type

This section allows you to select Demographic report type. Check the Type you wish and then click OK button.

☐ Demographic Block Groups Report
☒ Demographic Summary Report

OK Cancel

Select Demographic Summary Report, then click OK.

Set Cutoff for Race Summary

0 % 100 %

Coverage 100%
Cumulative 100%

Incidence 0%
Cumulative 92%

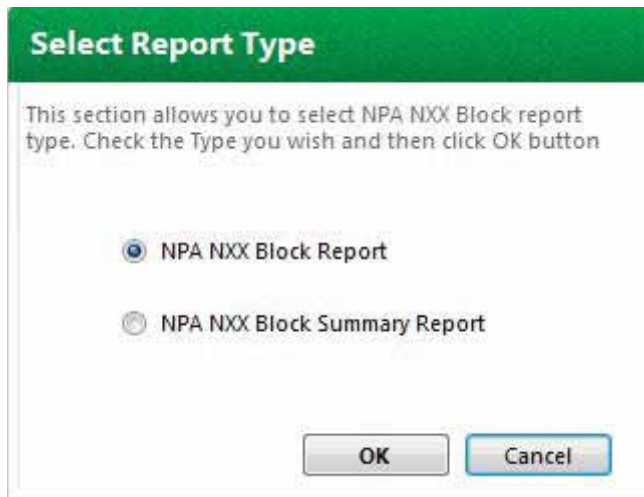
Block Groups 141 Included 141 Excluded 0
Target: Hispanic/Latino, White, Two or More Races

Percent	Block Groups	Total Individual Population	Total Cumulative Population	Target Individual Population	Target Cumulative Population	Individual Incidence	Cumulative Incidence	Coverage
100	0	0	0	0	0	0	0	0
95	49	57013	57013	55535	55535	97	97	37
90	48	57323	114336	53253	108788	93	95	73
85	24	28863	143199	25298	134086	88	94	90
80	12	11883	155082	9785	143871	82	93	96
75	2	1834	156916	1426	145297	78	93	97
70	2	2507	159423	1806	147103	72	92	98
65	3	2177	161550	1444	148547	68	92	99
60	1	1302	162852	824	149371	63	92	100
55	0	0	162852	0	149371	0	92	100
50	0	0	162852	0	149371	0	92	100
45	0	0	162852	0	149371	0	92	100
40	0	0	162852	0	149371	0	92	100
35	0	0	162852	0	149371	0	92	100
30	0	0	162852	0	149371	0	92	100
25	0	0	162852	0	149371	0	92	100

Save Print Cancel

Note the slider running across the top of the window. It is set at 100%, which is reflected in the Coverage statement on the window. As you move the slider to the left, decreasing the Coverage from 100%, the Coverage statement changes accordingly.

Go back to the Add Demographic window. Under Define NPA NXX Block Cutoff, click View Report. The Select Report Type window opens.

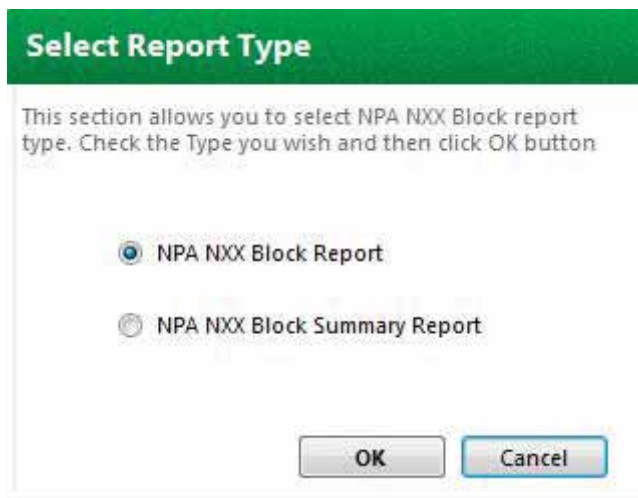


The dialog box has a green header bar with the text "Select Report Type". Below the header, there is a paragraph of text: "This section allows you to select NPA NXX Block report type. Check the Type you wish and then click OK button". Underneath this text, there are two radio button options. The first option is "NPA NXX Block Report" and it is selected, indicated by a blue dot. The second option is "NPA NXX Block Summary Report" and it is not selected, indicated by a grey dot. At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

Select NPA NXX Block Report, then click OK to submit your report.

Define Exchange Cutoff

Your options under Define Exchange Cutoff (optional) are defaulted to a certain Incidence and Coverage. Change these if needed. Then click to View Report. The Select Report Type window opens.

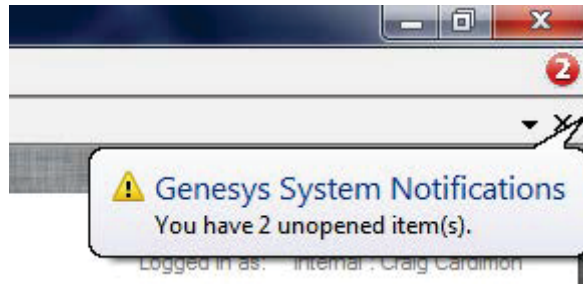


This is a duplicate of the dialog box shown in the previous image. It has a green header bar with the text "Select Report Type". Below the header, there is a paragraph of text: "This section allows you to select NPA NXX Block report type. Check the Type you wish and then click OK button". Underneath this text, there are two radio button options. The first option is "NPA NXX Block Report" and it is selected, indicated by a blue dot. The second option is "NPA NXX Block Summary Report" and it is not selected, indicated by a grey dot. At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

Your report type options here are:

- NPA NXX Block Report (default)
- NPA NXX Block Summary Report

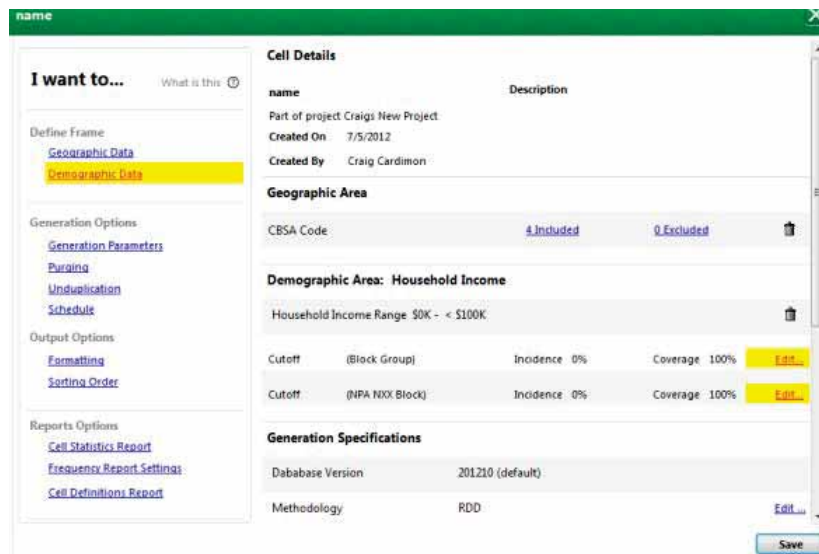
Select the report you want and click OK. Again, when your material is ready, you will receive a Genesys System Notification in the upper right corner of Genesys System.



Click the red notification to get your message.



Click View to see your report.



Generation Parameters

Click Generation Parameters to view or modify how you are generating sample. The "Set pieces to Generate and Method" window opens.

The screenshot shows the 'RDD Landline Sample Cell' application window. On the left, a sidebar titled 'I want to...' contains several links: 'Generation Parameters' (highlighted), 'Demographic Data', 'Generation Options', 'Output Options', and 'Reports Options'. The 'Generation Parameters' link is selected, and its sub-links are 'Generation Parameters', 'Parameters', 'Undersampling', 'Subsides', 'Formatters', and 'Sampling Criteria'. The 'Reports Options' sub-links are 'Cell Statistics Report', 'Frequency Report Settings', and 'Cell Definitions Report'.

The main window displays a dialog box titled 'Set pieces to Generate and Method'. The dialog box has a green header and a close button. It contains the following steps and fields:

- Step 1:** Select the method of generation and WB.
 - ☒ RDD
 - ☐ PPS
 - ☐ Sequential
- Working Bank Threshold (1 to 15):** A text input field with the value '2'.
- Step 2:** Define the total pieces created.
 - Number of Interviews:** A text input field with the value '1'.
 - Expected Incidence:** A text input field with the value '100'.
 - Sample Rate:** A text input field with the value '1'.
 - Total Pieces to Generate:** A text input field with the value '1'.
- Step 3:** Define Replicate Scope (optional).
 - Starting Replicate Number:** A text input field with the value '1'.
 - What is this?** A dropdown menu with the value 'Number of Replicates'.
 - Number of Replicates:** A text input field with the value '1'.

At the bottom of the dialog box are 'Save' and 'Cancel' buttons. On the right side of the main window, there are several 'Edit...' buttons and a 'Save' button at the bottom.

In Step 1, select the method of generation. Your options are:

- RDD
- PPS (not available for RDD Cellular)
- Sequential (not available for users outside the MSG firewall)

In Step 2, "Define the total pieces created." Type in the:

- Number of Interviewers
- Expected Incidence
- Sample Rate
- Total Pieces to Generate

In Step 3, "Define Replicate Scope (optional)." Type in the Starting Replicate Number. From the list, select one of these options:

- Not Defined (default selection) -- NOTE: If you select "Not Defined," then the Starting Replicate Number and the number box for the Number of Replicates will be disabled.
- Number of Replicates
- Numbers per Replicate

Save any changes.

RDD Generation Parameter Notes

Number of Interviews: This is the number of interviews completed, or quota of completes, for this cell. This number must be greater than or equal to 1.

Expected Incidence: This is the estimated percent of household contacts that will qualify for the survey based on any screening process in the survey. The incidence rate is entered as a whole number with up to one decimal place. Accepted ranges are 0.5 to 100.0.

Sample Rate: This is the number of sample pieces needed to obtain a completed window. A "screen" is defined as someone who will answer your qualifying questions, even though they may not qualify for the survey.

Note: Genesys uses the following equation to calculate the number of pieces to generate:

$$(\text{Number of Interviews} / \text{Expected Incidence}) * \text{Sample Rate} = \text{Number of Pieces}$$

The number of interviews divided by the expected incidence multiplied by the sample rate equals the number of pieces to generate. This is the equation the software uses to generate the sample. The calculation used to determine the number of pieces to generate is based solely on the information supplied by the user.

Many users may already know the number of pieces they require before reaching this point. To default the system to generate the number of pieces desired, set the number of interviews equal to the pieces wanted, and set the expected incidence to 100 and the sample rate to 1.

Number of Reps (Replicates): A replicate is a representative subset of the entire sample file, where each of these subsets is representative of the original sample file. For example, if 10% of your entire sample file was in California, then 10% of the phone number in each replicate will also be in California.

The number of replicates is entered as a whole number (no decimals). Accepted ranges are 1 to 999.

The number of replicates entered must be less than or equal to the number of pieces that will be generated.

Starting Replicate: The Starting Replicate number default is 1, and unless you change this, the replicate number assignment will begin with 1. For example, if the number of replicates specified is 10 and the starting replicate number is 1, then the sample will be put in 10 replicates numbered 1 to 10.

Another example, if the number of replicates specified is 10, but the starting replicate number is set to 5, then the sample file will be put into 10 replicates numbered 5 to 14. This option to change the starting replicate number is valuable when generating additional sample for a particular cell.

Purging

Click Purging to open the Specifying Purging Options window. This is available for RDD Landline only. This is not available for RDD Cellular.



Use this window to select the data sets for purging your generated data against. Your options are:

- Remove Known Businesses (default choice)
- Purge Against NeuStar Data (Requires a NeuStar License)
- Replace the purged numbers

Unduplication

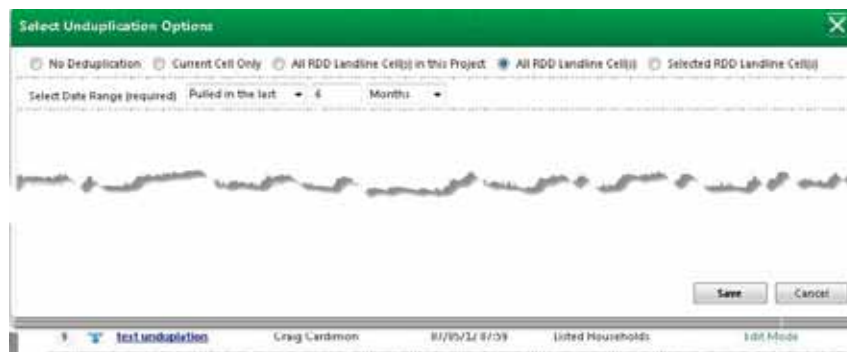
Click Unduplication. The Select Unduplication Options window opens.



Your options are:

- No Deduplication (default choice)
- Current Cell Only
- All RDD Cells in this Project
- All RDD Landline Cells
- Selected RDD Landline Cells

If you select All RDD Landline Cells, more options appear.



You need to Select Date Range. This is required. The default is "Pulled in the last 6 Months." You may modify this.

Your choices for pulling are:

- Pulled in the last
- Pulled between

Type in your choice for the amount of time. This is defaulted to "6."

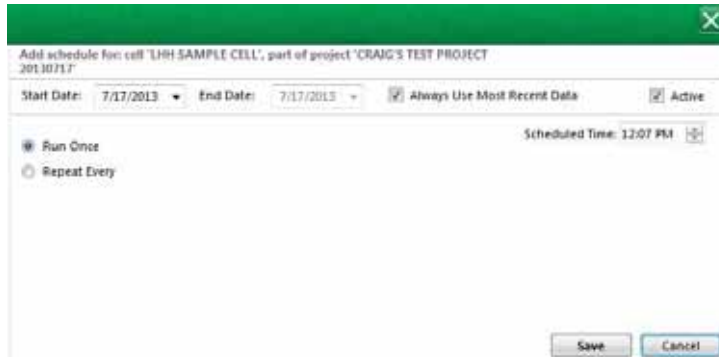
Your choices for measuring the length of time are:

- Days
- Months (default)
- Years

Remember to Save any changes.

Schedule

Click Schedule.



Your options are:

- Start Date
- End Date
- Always Use Most Recent Data
- Active
- Run Once or Repeat Every

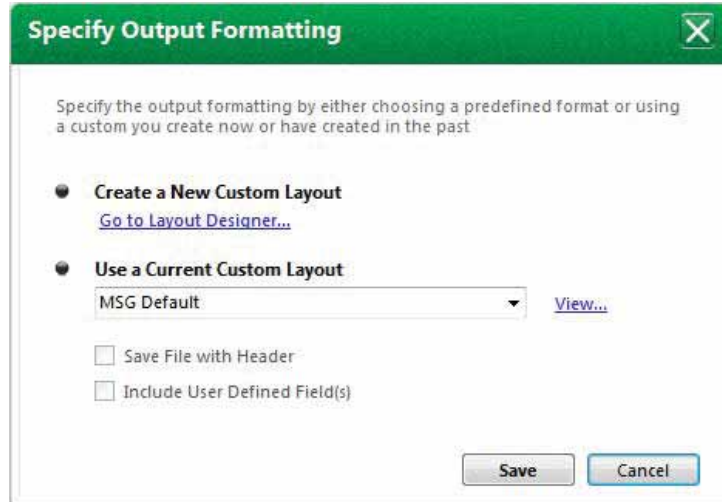
If you select "Repeat Every," more options appear. You will need to select how many times to run the job (1-12), and a time span of Days, Weeks, or Months.



Click Save to preserve any changes, then click Close.

Formatting

Click Formatting.



The image shows a dialog box titled "Specify Output Formatting" with a green header bar and a close button (X) in the top right corner. The main area contains the following elements:

- Instructional text: "Specify the output formatting by either choosing a predefined format or using a custom you create now or have created in the past."
- Two radio buttons for selection:
 - Create a New Custom Layout**: This option is selected. Below it is a blue hyperlink: [Go to Layout Designer...](#)
 - Use a Current Custom Layout**: This option is unselected. Below it is a dropdown menu showing "MSG Default" and a blue hyperlink: [View...](#)
- Two checkboxes:
 - ☐ Save File with Header
 - ☐ Include User Defined Field(s)
- Two buttons at the bottom right: "Save" and "Cancel".

Use the Specify Output Formatting window to configure the output formatting. Select either a new custom layout, or choose from a list of current custom layouts.

Create a New Custom Layout

If you choose to Create a New Custom Layout, click Go to Layout Designer to build your new layout. The Add New Sample Layout window opens.

Add New Sample Layout

This editor allows you to create a custom output layout. Name the layout so you can find and reuse it easily.

Layout Name: DB Type: **RED (Landline) Sample**

Output Delimiter: ☒ Fixed Width ☐ Comma ☐ Semicolon ☐ Tab ☐ Space ☐ Other

Available Fields: ☐ Show RDD Fields only

Length	Field Name
10	Phone Number
10	Time Zone
10	Replicate
10	Unit
10	Assignments
10	Total Pop
10	Percent Listed
10	Household Density
10	PPS
2	State
30	City
10	CSA Code
10	Metropolitan
10	Microropolitan
4	MSA
1	Met Status

Output Order

Field Name	Start	End
------------	-------	-----

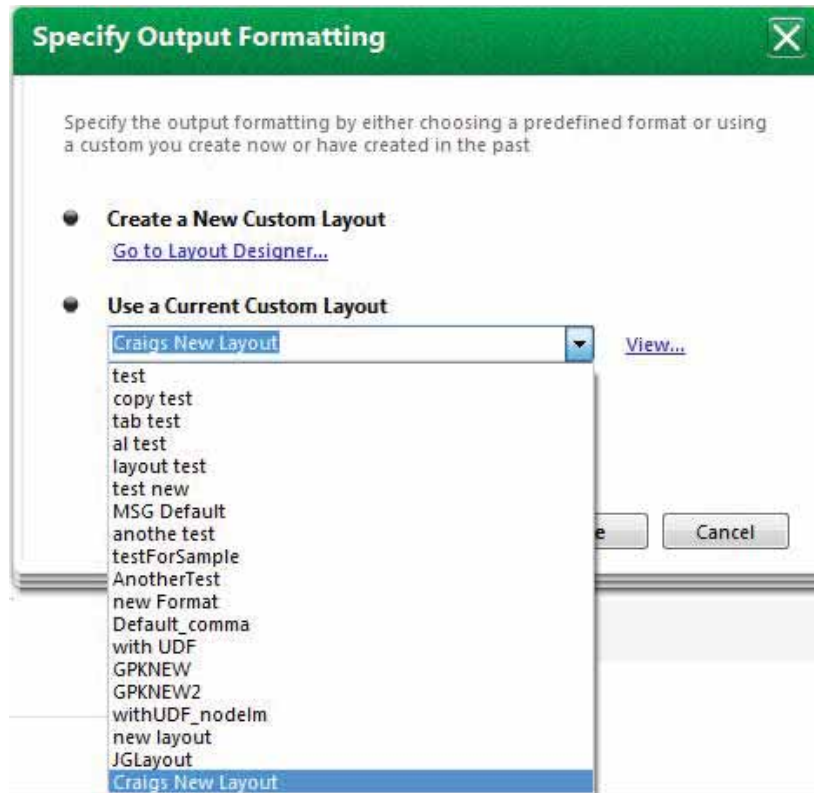
Save Clear Cancel

Type in a name for the layout and configure as needed. Your choices under Output Delimiter are:

- Fixed Width (default choice)
- Comma
- Semicolon
- Tab
- Space
- Other

Drag entries from Available Fields on the left, to Output Order on the right. Remember to Save any changes.

If you create a New Custom Layout, that layout becomes the default option shown in the Use a Current Custom Layout box in the Specify Output Formatting window. If you create a custom layout but decide not to use it right away, click the list, as shown in the screen shot below, and choose another layout.



The options to Save File with Header and Include User Defined Fields will be available if the layout calls for those options, otherwise they remain unavailable.

Use a Current Custom Layout

Click the list as shown in the screen shot above, select a layout, and click View. A report is generated using the layout you specified.

Sorting Order

Click Sorting Order. The Specify Sorting Order window opens.

Specify Sorting Order 

This section allows you to select order of the fields being output for this cell. Check the fields you wish to sort and then drag them in order you wish to sort by


	Field Name	
<input type="checkbox"/>	CBSA Code	
<input type="checkbox"/>	CBSA Div Code	
<input type="checkbox"/>	Census Division	
<input type="checkbox"/>	Census Region	
<input type="checkbox"/>	Daylight Savings	
<input type="checkbox"/>	DMA	
<input type="checkbox"/>	DMA Rank	
<input type="checkbox"/>	DMA Size	
<input type="checkbox"/>	FIPS	
<input type="checkbox"/>	Met Status	
<input type="checkbox"/>	Metropolitan	
<input type="checkbox"/>	Micropolitan	
<input type="checkbox"/>	Replicate	

☐ Randomize Order

Save

Cancel

Select the fields in the order you want to sort by, and the fields will automatically rearrange themselves.

Specify Sorting Order 

This section allows you to select order of the fields being output for this cell. Check the fields you wish to sort and then drag them in order you wish to sort by.

	Field Name	
<input checked="" type="checkbox"/>	CBSA Code	1
<input checked="" type="checkbox"/>	Census Division	2
<input checked="" type="checkbox"/>	Census Region	3
<input checked="" type="checkbox"/>	Daylight Savings	4
<input checked="" type="checkbox"/>	DMA	5
<input type="checkbox"/>	CBSA Div Code	
<input type="checkbox"/>	DMA Rank	
<input type="checkbox"/>	DMA Size	
<input type="checkbox"/>	FIPS	
<input type="checkbox"/>	Met Status	
<input type="checkbox"/>	Metropolitan	
<input type="checkbox"/>	Micropolitan	
<input type="checkbox"/>	Replicate	

☐ Randomize Order

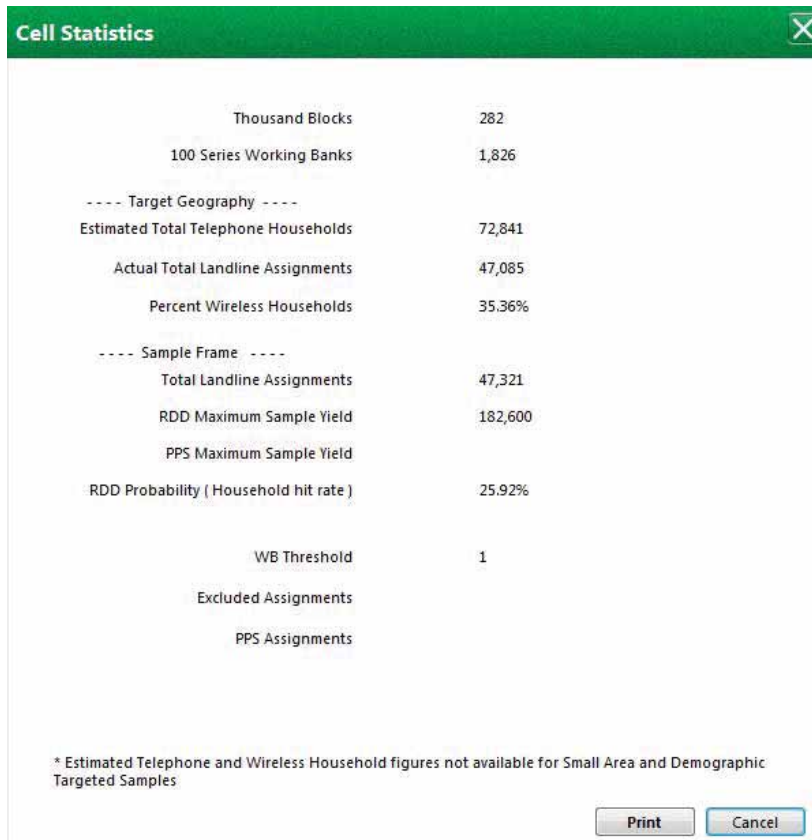
Save

Cancel

Remember to Save your work.

Cell Statistics Report

Click Cell Statistics Report. The Cell Statistics window opens.



The screenshot shows a window titled "Cell Statistics" with a green header bar. The window contains a list of statistics and their values, organized into sections separated by dashed lines. At the bottom, there is a note about estimated figures and two buttons: "Print" and "Cancel".

Statistic	Value
Thousand Blocks	282
100 Series Working Banks	1,826
---- Target Geography ----	
Estimated Total Telephone Households	72,841
Actual Total Landline Assignments	47,085
Percent Wireless Households	35.36%
---- Sample Frame ----	
Total Landline Assignments	47,321
RDD Maximum Sample Yield	182,600
PPS Maximum Sample Yield	
RDD Probability (Household hit rate)	25.92%
WB Threshold	1
Excluded Assignments	
PPS Assignments	

* Estimated Telephone and Wireless Household figures not available for Small Area and Demographic Targeted Samples

Print Cancel

The cell statistics reported here are:

Working Banks	RDD Probability (Household Hitrate)
Landline Assignments	PPS Probability (Household Hitrate)
Estimated Telephone Households	WB Threshold
Estimated Cell Only Households	Excluded Assignments
Maximum Sample Yield	PPS Assignments

The PPS Probability Household Hitrate and PPS Assignments fields are populated only if a PPS sample is created. Therefore, if you have a new cell and you run a "Cell Statistics Report," these fields will not be populated. If you pick "Cell Statistics Report" for a cell that used the PPS Method of Generation and has already generated a sample and none of the specifications have changed, you can see numbers in this report.

Frequency Report Settings

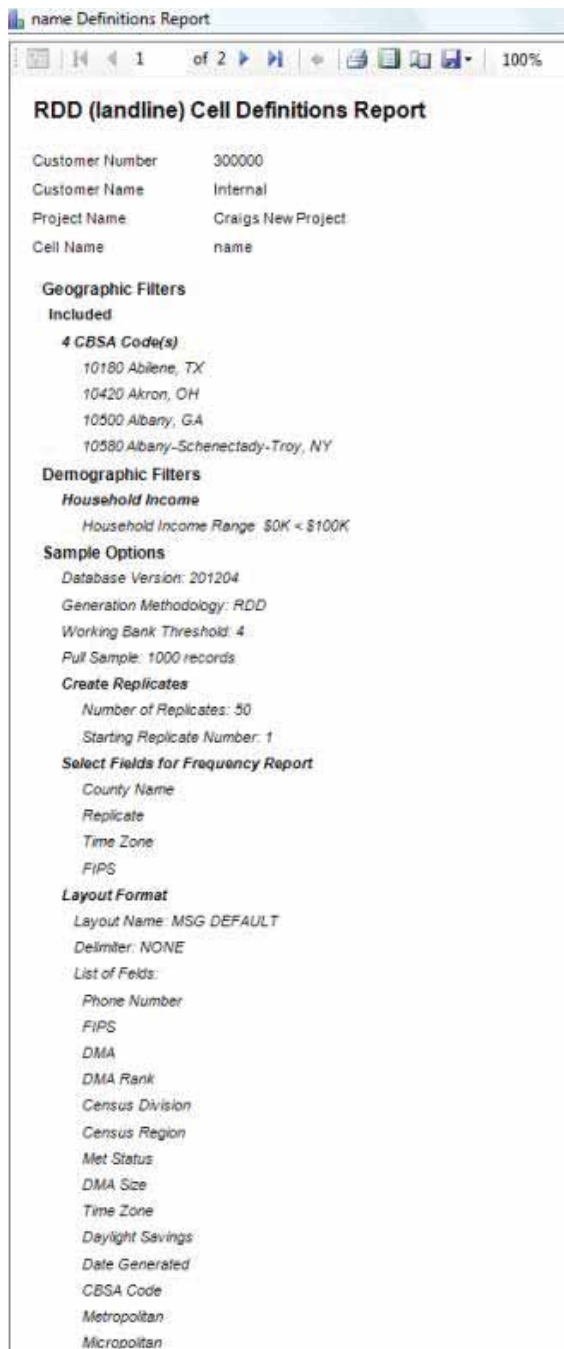
Click Frequency Report Settings. The Frequency Fields Selection window opens, displaying the frequencies being applied to your cell.



Modify as needed and then Save.

Cell Definitions Report

Click Cell Definitions Report. The definitions report for your cell opens.



name Definitions Report

1 of 2 100%

RDD (landline) Cell Definitions Report

Customer Number: 300000
Customer Name: Internal
Project Name: Craigs New Project
Cell Name: name

Geographic Filters
Included
4 CBSA Code(s)
10180 Abilene, TX
10420 Akron, OH
10500 Albany, GA
10580 Albany-Schenectady-Troy, NY

Demographic Filters
Household Income
Household Income Range: \$0K < \$100K

Sample Options
Database Version: 201204
Generation Methodology: RDD
Working Bank Threshold: 4
Full Sample: 1000 records

Create Replicates
Number of Replicates: 50
Starting Replicate Number: 1

Select Fields for Frequency Report
County Name
Replicate
Time Zone
FIPS

Layout Format
Layout Name: MSG DEFAULT
Delimiter: NONE
List of Fields:
Phone Number
FIPS
DMA
DMA Rank
Census Division
Census Region
Met Status
DMA Size
Time Zone
Daylight Savings
Date Generated
CBSA Code
Metropolitan
Micropolitan

Edit

On the right side of the [RDD cell editor](#) you can see the:


- Cell Details
- Geographic Area
- Demographic Area
- Generation Specifications

Use the Edit links under "Demographic Area" and under "Generation Specifications" to make modifications.

The details of your cell are listed under Cell Details.


Under Geographic Area, you can see the geographic filters that are being applied to your cell. In this example in the screen shot of the [RDD cell editor](#) above, you see "CBSA Code."

Geographic Area

CBSA Code [4 Included](#) [0 Excluded](#) 

Links for the included and excluded codes are adjacent. To see the included codes in this example, you would click the link "4 Included." See the screen shot below.



Save the codes as a text file or print them if need be. Delete the codes altogether by clicking the trash icon .

If you chose Household Income as a filter, under Demographic Area, you see the household income filters that are being applied to your cell and edit these as needed.

Demographic Area: Household Income

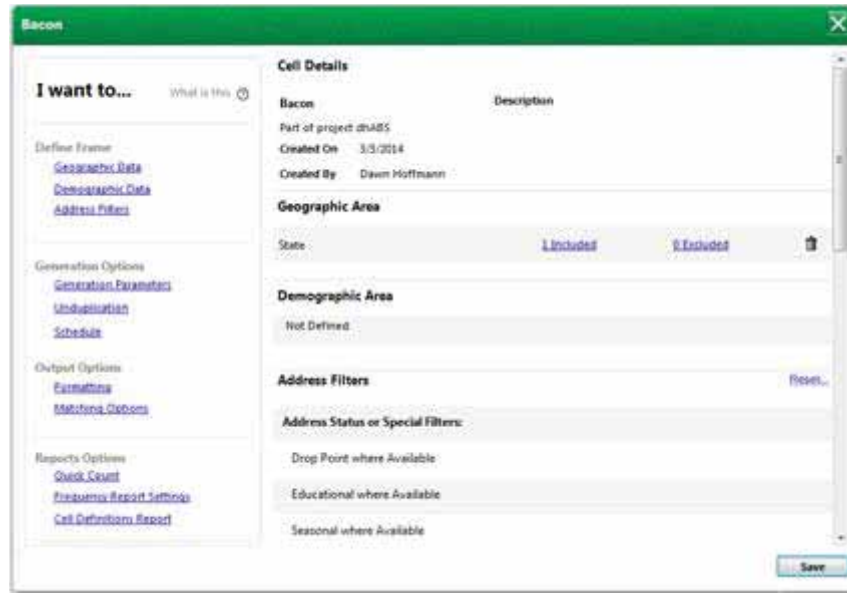
Household Income Range: \$0K < \$35K 				
Cutoff	(Block Group)	Incidence	51%	Coverage 40% Edit...
Cutoff	(NPANXX)	Incidence	42%	Coverage 30% Edit...

To define your frame by geography, click Geographic Data.

To define your frame by demography, click Demographic Data.

ABS Sample Cell

Use the cell editor that opens when you create an Address-Based Sample Cell to define your frame, modify your generation options, change your output options, and set your report options.



On the left side of the screen, the "I want to" section contains the following options:

Under Define Frame:

- Geographic Data
- Demographic Data
- Address Filters

Under Generation Options:

- Generation Parameters
- Unduplication
- Schedule

Under Output Options:

- Formatting
- Matching Options

Under Reports Options:

- Quick Count
- Frequency Report Settings
- Cell Definitions Report

On the right side of the screen under Cell Details are more options:

Under Geographic Area, you see the codes you used. Click the links see the codes included and excluded. Delete codes by clicking the trashcan icon.

Under Address Filters, you see the filters you used. Click Reset to modify these.

Under Generation Specifications, you see the Database Version and Methodology used. Click Edit to modify.

Geographic Data

Click Geographic Data to view or modify the Geographic Filters being applied to your cell.

From Genesys

The Geographic Filters window opens to the From Genesys tab.

Note: If your cell uses national geography, the "Include" option is not available and your filters are set to "Exclude." You need to create a cell with custom geography for the Include option to be available.

The screenshot shows the 'Geographic Filters' window with the 'From Genesys' tab selected. The window has a green header bar with the title 'Geographic Filters' and four tabs: 'From Genesys', 'Input Data', 'From File', and 'Error'. Below the header, the text 'Select from Genesys' is displayed. The main content area is divided into three steps:

- Step 1:** Select the type of geographic specification that you are adding:
 ☒ Include ☐ Exclude
- Step 2:** Select Geography Type:
 A dropdown menu shows '2000 Census Block'.
- Step 3:** Please select the geographic data that will be defined in your cell specifications:
 A large empty rectangular box is provided for selection.

At the bottom left, a status message reads 'The geography(s) have been updated'. At the bottom right, there is a 'Close' button.

Work through the tabs from left to right:

- From Genesys
- Input Data (hand entering)
- Import From File
- Error

Step 1, "Select the type of geographic specification that you are adding." The choices are "Include" (default) and "Exclude."

Step 2, "Select Geography Type."

Use the search box to select a geographic target. For example, type "phil" into the search box to find the Philadelphia FIPS. When using an asterisk (*), type in "42*," for instance, to find any FIPS codes starting with "42."

Geographic Filters

Select from Genesys

Step 1: Select the type of geographic specification that you are adding
☒ Include ☐ Exclude

Step 2: Select Geography Type
 FIPS 42

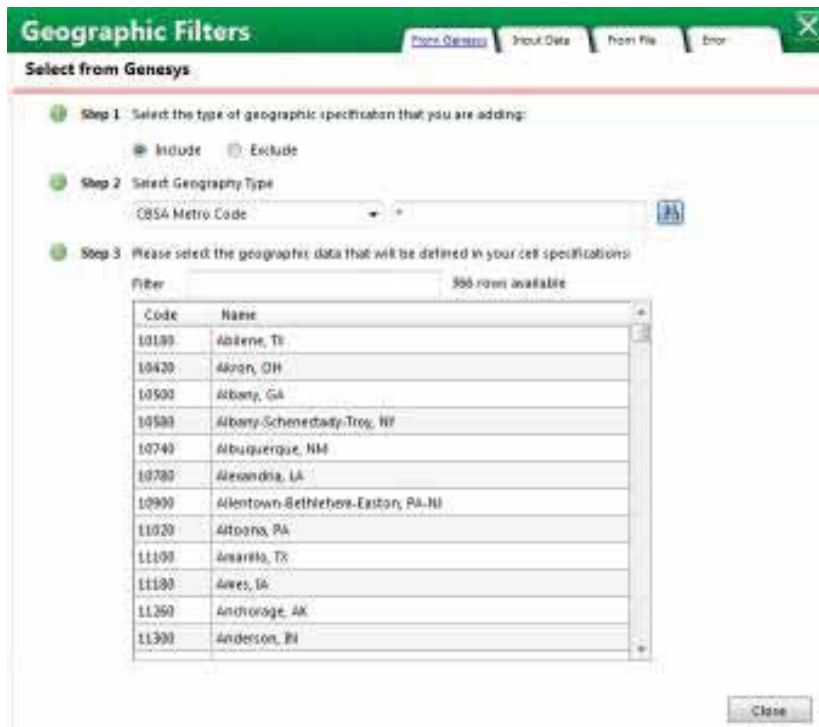
Step 3: Please select the geographic data that will be defined in your cell specifications:
 Filter 67 rows available

Code	Name	Location
42001	Adams	PA
42003	Allegheny	PA
42005	Armstrong	PA
42007	Beaver	PA
42009	Bedford	PA
42011	Berks	PA
42013	Blair	PA
42015	Bradford	PA
42017	Bucks	PA
42019	Butler	PA
42021	Cambria	PA
42023	Cameron	PA

Close

Using the asterisk by itself lists every variable available for that level of geography. To see lists of FIPS codes, visit <http://www.m-s-g.com/We-b/genesys/resources.aspx>. Remember to click the binoculars icon to initiate a search and generate a list of results.

Step 3, "Please select the geographic data that will be defined in your cell specifications." Highlight the names you want, or enter a code into the Filter box, and then click Close to process the results.



The screenshot shows the 'Geographic Filters' window with the 'From Genesys' tab selected. It displays three steps for selecting geographic data. Step 1 has 'Include' selected. Step 2 has 'CBSA Metro Code' selected. Step 3 shows a list of 396 items with columns for Code and Name.

Geographic Filters From Genesys Input Data From File Error

Select from Genesys

Step 1 Select the type of geographic specification that you are adding:
☒ Include ☐ Exclude

Step 2 Select Geography Type
CBSA Metro Code

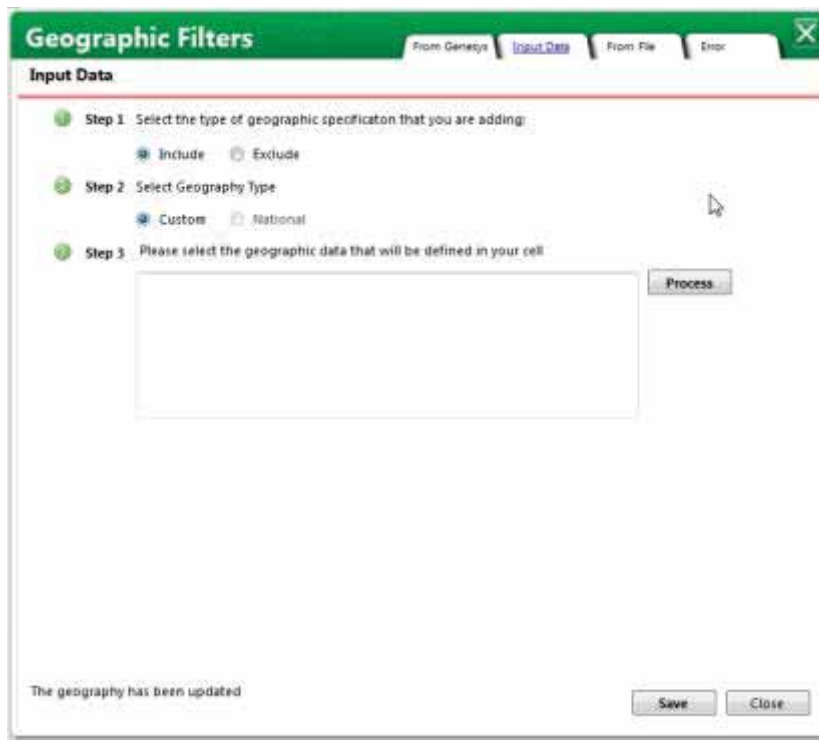
Step 3 Please select the geographic data that will be defined in your cell specifications:
Filter 396 items available

Code	Name
10100	Abilene, TX
10420	Akron, OH
10500	Albany, GA
10580	Albany-Schenectady-Troy, NY
10740	Albuquerque, NM
10780	Alexandria, LA
10900	Allentown-Bethlehem-Easton, PA-NJ
11020	Altoona, PA
11100	Amarillo, TX
11180	Anchorage, AK
11260	Anchorage, AK
11300	Anderson, IN

Close

Input Data

To set up input data, click the Input Data tab on the Geographic Filters screen, and configure as needed.



The screenshot shows the 'Geographic Filters' window with the 'Input Data' tab selected. It displays three steps for selecting geographic data. Step 1 has 'Include' selected. Step 2 has 'Custom' selected. Step 3 shows a large empty text area for input, with a 'Process' button to the right. At the bottom, there is a 'Save' button and a 'Close' button.

Geographic Filters From Genesys **Input Data** From File Error

Input Data

Step 1 Select the type of geographic specification that you are adding:
☒ Include ☐ Exclude

Step 2 Select Geography Type
☒ Custom ☐ National

Step 3 Please select the geographic data that will be defined in your cell

Process

The geography has been updated

Save Close

Step 1, "Select the type of geographic specification that you are adding." The choices are "Include" (default) and "Exclude."

Step 2, "Select Geography Type." The choices are "Custom" (default) and "National."

Step 3, "Please select the geographic data that will be defined in your cell." Copy the data you want to add (such as a list of Census Tracts). The application determines what the data qualifies (based on size) and gives you a list of options. Select the appropriate option and save your data. Any errors that occur when adding the data shows up on the Error tab.

Be sure to Save any changes.

Import From File

To import from a file, click the From File tab, and configure as needed.

The screenshot shows the 'Geographic Filters' dialog box with the 'Import from File' tab selected. The dialog has a green header bar with the title 'Geographic Filters' and a close button. Below the header, there are four tabs: 'From Census', 'Input Data', 'From File', and 'Error'. The 'From File' tab is active. The main content area is divided into four steps:

- Step 1:** Select the type of geographic specification that you are adding. It has two radio buttons: 'Include' (selected) and 'Exclude'.
- Step 2:** Select Geography Type. It has a dropdown menu with 'CBSA Metro Code' selected.
- Step 3:** Please select file to be imported. It has a text input field and a 'Browse' button.
- Step 4:** Set starting position for import. View file if needed. It has a text input field with '1' and a 'View' button.

At the bottom of the dialog, there are 'Save' and 'Close' buttons.

Step 1, "Select the type of geographic specification that you are adding." The choices are "Include" (default) and "Exclude."

Step 2, "Select Geography Type."

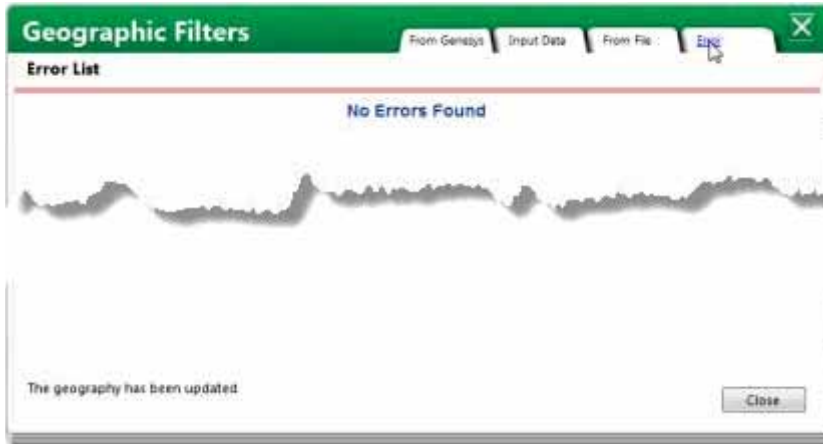
Step 3, "Please select file to be imported." Click Browse to find the file.

Step 4, "Set starting point for Import. View file if needed."

Be sure to Save any changes.

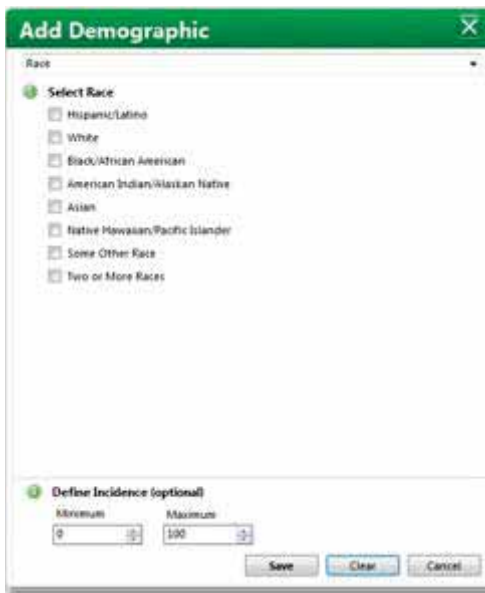
Error

To see a list of possible errors, click the Error tab.



Demographic Data

Click Demographic Data to view or modify the demographic filters being applied to your cell.



The choices you are given change according to the demographic item you select from the list at the top of the window. Note that you cannot combine demographics.

Your demographic choices are:

- Race
- Household Income
- Household Income by Poverty
- Median Household Income
- Education
- Median Home Value

- Household Composition
- Ancestry (Block Group)
- Average Income (Block Group)

Address Filters

Click Address Filters to view or modify the address filters being applied to your cell.

The Address Filters window opens.

Address Filters for: ABS cell

Address Types

- ☒ Residential
- ☒ Residential some Business
- ☒ Business
- ☒ Business some Residential
- ☐ No Stat Only

Primary Address Filters

- ☒ City Style
- ☒ Rural Route
- ☒ Highway Contract
- ☒ PO Box
- ☒ Traditional PO Boxes
- ☒ Only Way to Get Mail

Secondary Address Status or Special Filters

- ☒ Must be Seasonal
- ☒ Must be Educational
- ☒ Must be Vacant
- ☒ Must be Throwback
- ☒ Must be Drop Point
- ☒ Expand Drop Points
- ☒ Include SPDU Only
- ☒ Include No Stat (Planned Development) Addresses
- ☒ Exclude No Stat (Other Reason) Addresses

Save

Address Types

Your options for "Address Types" are:

- Residential
- Residential Some Business
- Business
- Business Some Residential
- No Stat Only

Primary Address Filters

Your options for "Primary Address Filters" are:

- City Style
- Rural Route
- Highway Contract
- PO Box
- Traditional PO Boxes
- Only Way to Get Mail

Secondary Address Status or Special Filters

Your options for "Secondary Address Status or Special Filters" are:

- Must be Seasonal
- Must be Educational
- Must be Vacant
- Must be Throwback
- Must be Drop Point
- Expand Drop Points
- Include SFDU Only (Single-Family Dwelling Unit)
- Exclude No Stat (Planned Development) Addresses (Exclude is the default)
- Exclude No Stat (Other Reason) Addresses (Exclude is the default)

No Stat

The CDS data used to create the ABS frame has another component called the "No Stat" file. The No Stat file contains undeliverable addresses. These addresses are undeliverable for many reasons.

Note: If you select "No Stat Only" under Address Types, then you should also select either "Include No Stat (Planned Development) Addresses" or "Include No Stat (Other Reason) Addresses," otherwise the cell will not contain any data. The application checks for this.

Save your work.

Generation Parameters

Click Generation Parameters to view or modify how you are generating sample. The "Set Generation Parameters" window opens.

Set Generation Parameters

This section allows you to define how you generate your total pieces. It also allows you greater control of how you collect interviewers and the rate it will create a sample file from them

1

Step 1 Select Sampling Method

☒ Random selection within fixed size intervals

☐ Systematic selection within fixed size intervals

2

Step 2 Define Count or the Total Pieces to Generate

☐ Count Only

☐ Generate All Available

Total Pieces to Generate

3

Step 3 Define Replicate Scope (optional)

Starting Replicate Number

What is this ? Not Defined

Save

Cancel

In Step 1, select the method of generation. Your options are:

- Random selection within fixed size intervals
- Systematic selection within fixed size intervals

In Step 2, "Define Count or the Total Pieces to Generate" -

- Count Only
- Generate All Available
 - Total Pieces to Generate - type in a number

In Step 3, "Define Replicate Scope (optional)." Type in the Starting Replicate Number.

From the list, select one of these options:

- Not Defined
- Number of Replicates
- Numbers per Replicate

Save any changes.

Unduplication

Click Unduplication. The Select Unduplication Options window opens.



Your options are:

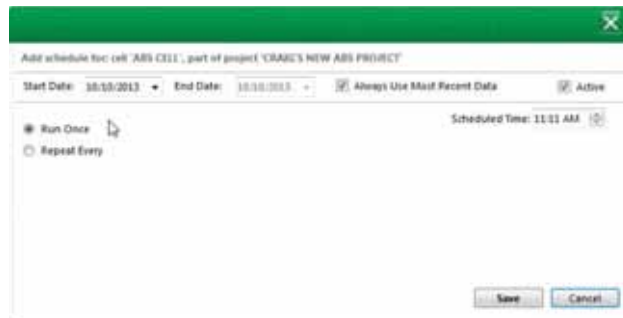
- No Deduplication (default choice)
- Current Cell Only
- All Address Based Cells in this Project
- Selected Address Based Cells

If you select "Selected Address Based Cells," a list opens in the lower right corner of the window. This list enables you to select an Unduplication cell that contains phone numbers. The phone number cells show up only if Matching is used. Yes, Matching does come after Unduplication in the window. The colors of the text change to show it is a Phone Unduplication cell.

Remember to Save any changes.

Schedule

Click Schedule.



Your options are:

- Start Date
- End Date
- Always Use Most Recent Data
- Active
- Run Once or Repeat Every

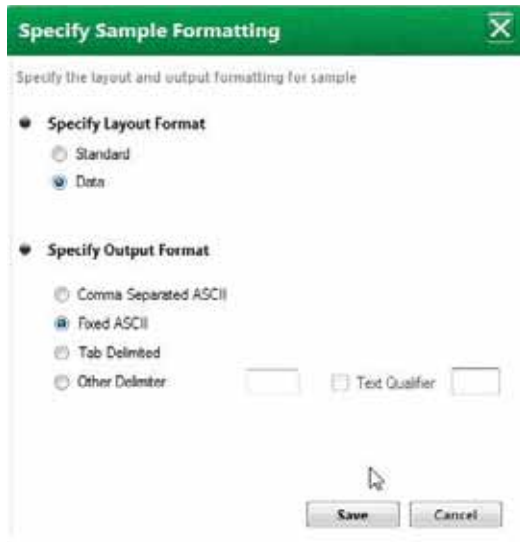
If you select "Repeat Every," more options appear. You will need to select how many times to run the job (1-12), and a time span of Days, Weeks, or Months.



Click Save to preserve any changes, then click Close.

Formatting

Click Formatting. The Specify Sample Formatting window opens.



Use this screen to configure the output formatting. Select either a new custom layout, or choose from among several current custom layouts.

Under Specify Layout Format, your options are:

- Standard
- Data (default)

Under Specify Output Format, your options are:

- Comma Separated ASCII
- Fixed ASCII (default)
- Tab Delimited
- Other Delimited

If you select Other Delimited, type in what the delimiter is, and complete the Text Qualifier information.

Matching Options

Click Matching Options. The Matching Options window opens.

Matching Options for: ABS cell

☐ Standard Matching ☐ Enhanced Matching ☒ No Matching

Append Name and Phone (where available)

☐ Append Surname Only ☐ Append Either Phone or Surname
☐ Append Phone Only ☐ Append Both Phone and Surname

Append Demographics (where available)

☒ Age ☒ Income ☒ P2 Age
☒ Asian Surname ☒ Marital Status ☒ Target 18 to 24
☒ Education ☒ Number of Adults ☒ Target 25 to 34
☒ Ethnicity ☒ Number of Children ☒ Target 35 to 44
☒ Gender ☒ Gen Rent Score ☒ Target 45 Plus
☒ Hispanic Surname ☒ Gen Rent ☒

Append Databases

<input checked="" type="checkbox"/>	Experian Listed Households
<input checked="" type="checkbox"/>	InfoUSA Listed Households
<input checked="" type="checkbox"/>	Targus Listed Households
<input type="checkbox"/>	Targus Online

Save Cancel

Your options across the top of the screen are:

- Standard Matching
- Enhanced Matching
- No Matching

No Matching

"No Matching" is selected by default and all other options on the window are unavailable.

Standard Matching

If you select "Standard Matching," then the "Append Name and Phone" options become available, and "Append Either Phone or Surname" is selected.

The "Append Demographics" options become available, but none are selected by default.

Under "Append Databases," the databases "Experian Listed Households," "InfoUSA Listed Households," and "Targus Listed Households" become available and are selected by default.

Enhanced Matching

If you select "Enhanced Matching," then two things happen

1. The additional option of "Targus Database Priority" appears at the top of the screen
2. "Targus Online" appears as under "Append Databases" and is selected by default

Remember to Save your work.

Quick Count

Click "Quick Count" to submit a job to run. When the job is finished, the data comes back to you for review. Quick Count won't work for the following Geographies:

- 2000 Census Tract
- 2000 Census Block Group
- 2000 Census Block
- 2010 Census Tract
- 2010 Census Block Group
- 2010 Census Block
- DMA
- DMA Rank
- ZIP Plus 4

Frequency Report Settings

Click Frequency Report Settings. The Frequency Fields Selection screen opens, displaying the frequencies being applied to your cell.



Modify as needed. Save.

Cell Definitions Report

Click Cell Definitions Report. The ABS Cell Definitions Report opens.

Address Based Cell Definitions Report

Customer Number: 330000
 Customer Name: Internal
 Project Name: Craig's New ABS Project
 Cell Name: ABS Cell

Geographic Filters

Included definitions: 1

48 State USA National/without DC

48 State USA National/without DC

Excluded definitions: 5

8 FPOW

31081 Guilford, NC

43007 Adams, PA

43003 Allegheny, PA

43005 Armstrong, PA

43107 Philadelphia, PA

Address Filters

Address Status or Special Filters:

Drop Point

Educational

Excluded Drop Points

Include No Star (Planned Development) Addresses

Seasonal

SPDU Only

Throughback

Vacant

Address Types:

Business Only

Business Only with Some Residential

Residential Only

Residential Only with Some Business

Primary Address Filters:

City Style

Highway Contract

PO Box

Rural Route

Traditional PO Box

Primary Address PO Box Filters:

Only Way to Get Mail

Full Options

Database Version: 201309

Deactivation Options

No Deactivation

Matching Options

Standard Matching

Append Name and Phone (where available)

Append Filter Phone or Surname

Edit

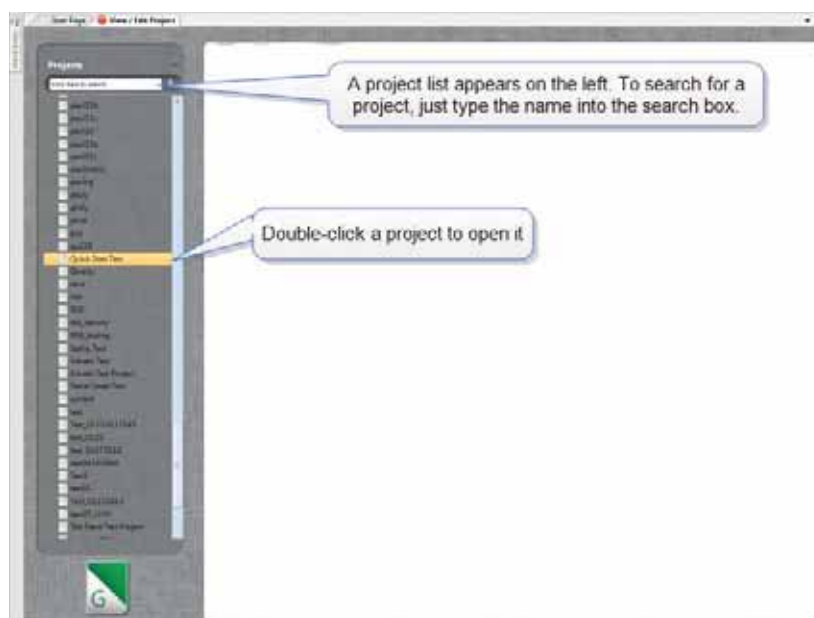
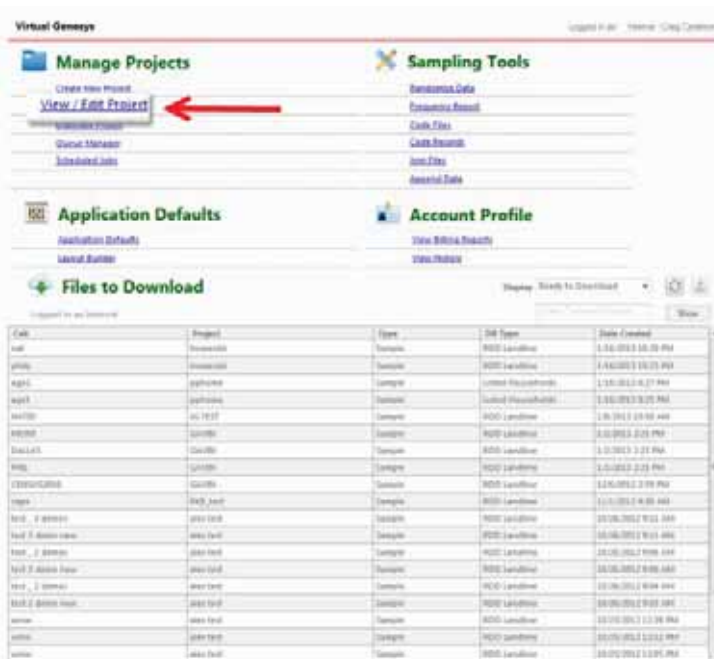
On the right side of the ABS window you see:

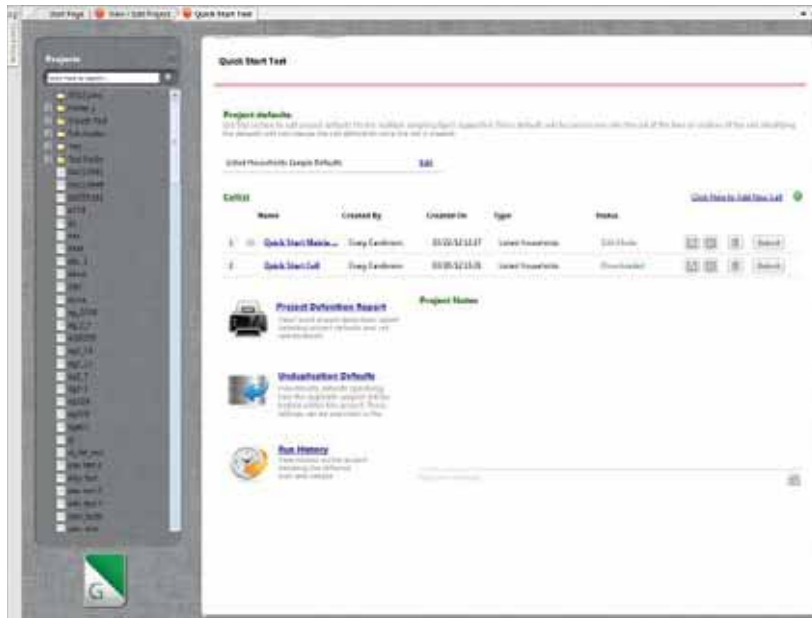
- Cell Details
- Geographic Area
- Address Filters
- Generation Specifications

Use the Reset link under Address Filters to modify your configuration.

Use the Edit links under Generation Specifications to modify any of these settings:

- Create Frequency Report
- Layout Format
- Save As
- Matching Options

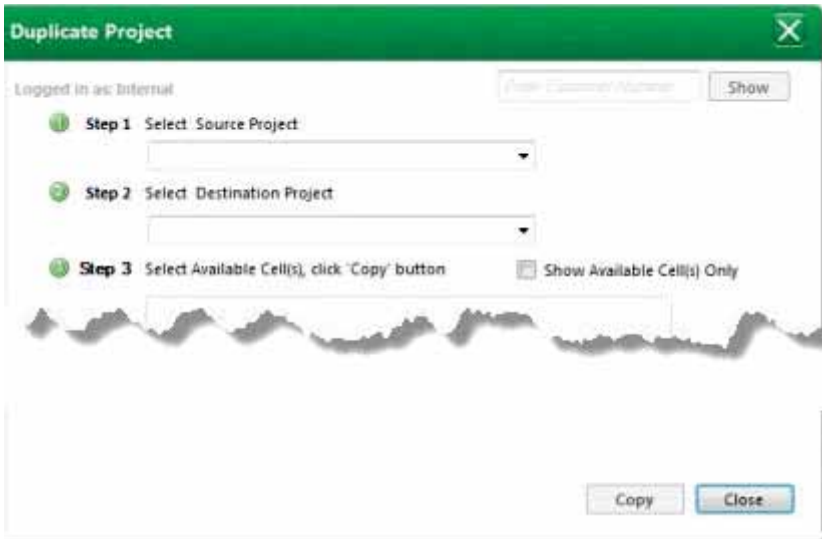
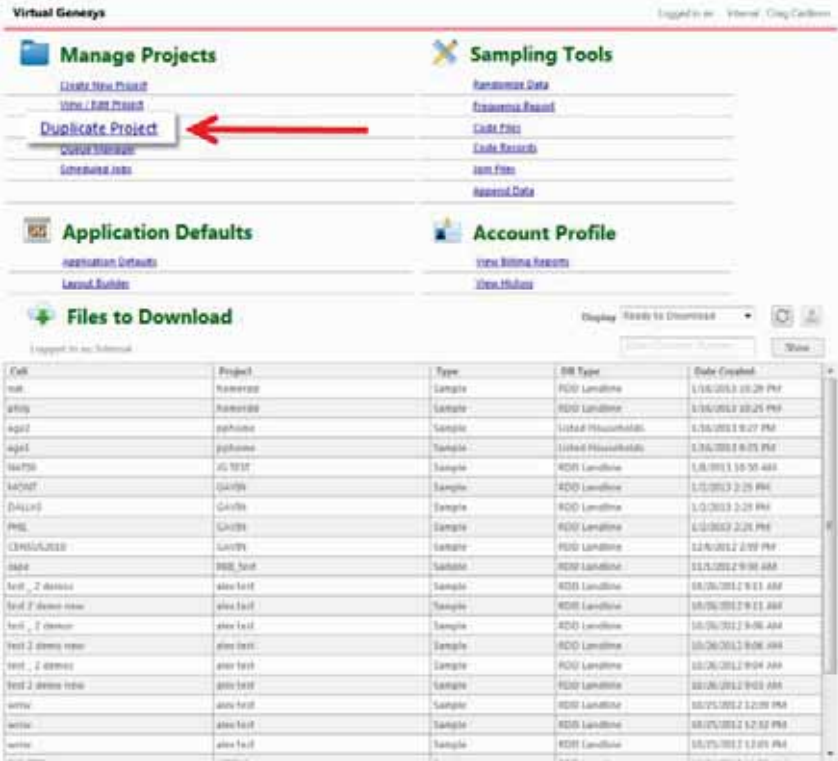




The project page's main sections are:

- Project Defaults
- Cells
- Project Notes

View and edit as needed.



In Step 2, Select a Destination Report to which to duplicate

In Step 3, Select Available Cells. You also have the option select the Show Available Cells Only if needed.

Click Copy.



Move jobs up and down in the queue by clicking your job and then clicking the up and down arrows. Delete jobs by clicking one and then clicking the trash icon.

Scheduled Jobs

To see your list of scheduled Jobs, click Scheduled Jobs.

Virtual Genesys Logged in as: Internal - Craig Carlson

Manage Projects

- [Create New Project](#)
- [View All Projects](#)
- [Duplicate Project](#)
- [Project Manager](#)
- [Scheduled Jobs](#)** ←

Sampling Tools

- [Randomize Data](#)
- [Frequency Report](#)
- [Code Files](#)
- [Label Records](#)
- [Join Files](#)
- [Assess Data](#)

Application Defaults

- [Application Defaults](#)
- [Layout Builder](#)

Account Profile

- [View Billing Records](#)
- [View History](#)

Files to Download

Display: Ready to Download Show

Lab	Project	Type	SW Type	Date Created
val	homework	Sample	RDD Landline	1/16/2013 10:26 PM
gphd	homework	Sample	RDD Landline	1/16/2013 10:25 PM
apri	aprihome	Sample	Linked Households	1/16/2013 9:27 PM
apri	aprihome	Sample	Linked Households	1/16/2013 9:25 PM
NAFHE	IG TEST	Sample	RDD Landline	1/6/2013 10:50 AM
TARGET	GADDS	Sample	RDD Landline	1/2/2013 2:25 PM
STELLAS	GADDS	Sample	RDD Landline	1/2/2013 2:25 PM
PHIL	GADDS	Sample	RDD Landline	1/2/2013 2:25 PM
CENSOUSUS	GADDS	Sample	RDD Landline	11/6/2012 2:59 PM
UNIT	NAF, test	Sample	RDD Landline	11/5/2012 9:30 AM
test_2 demo	alex test	Sample	RDD Landline	10/26/2012 9:11 AM
test_2 demo home	alex test	Sample	RDD Landline	10/26/2012 9:11 AM
test_2 demo	alex test	Sample	RDD Landline	10/26/2012 9:08 AM
test_2 demo test	alex test	Sample	RDD Landline	10/26/2012 9:08 AM
test_2 demo	alex test	Sample	RDD Landline	10/26/2012 9:08 AM
test_2 demo test	alex test	Sample	RDD Landline	10/26/2012 9:08 AM
test	alex test	Sample	RDD Landline	10/25/2012 12:30 PM
test	alex test	Sample	RDD Landline	10/25/2012 12:30 PM
test	alex test	Sample	RDD Landline	10/25/2012 12:30 PM

The Scheduled Jobs window opens.

Friday, April 11, 2014 - Scheduled Jobs

Project Name	Job Name	Job Type	Interval	Duration	Week Days	Last Execution Date	Status	Next Run Date
19402	19402	Global Housecall	1	Run Once	Week Days	4/10/2013 9:40 AM	Success	
19403	19403	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19404	19404	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19405	19405	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19406	19406	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19407	19407	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19408	19408	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19409	19409	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19410	19410	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19411	19411	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19412	19412	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19413	19413	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19414	19414	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19415	19415	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19416	19416	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19417	19417	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19418	19418	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19419	19419	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19420	19420	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19421	19421	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19422	19422	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19423	19423	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19424	19424	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19425	19425	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19426	19426	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19427	19427	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19428	19428	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19429	19429	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19430	19430	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19431	19431	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19432	19432	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19433	19433	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19434	19434	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19435	19435	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19436	19436	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19437	19437	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19438	19438	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19439	19439	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19440	19440	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19441	19441	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19442	19442	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19443	19443	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19444	19444	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19445	19445	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19446	19446	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19447	19447	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19448	19448	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19449	19449	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19450	19450	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19451	19451	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19452	19452	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19453	19453	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19454	19454	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19455	19455	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19456	19456	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19457	19457	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19458	19458	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19459	19459	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19460	19460	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19461	19461	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19462	19462	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19463	19463	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19464	19464	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19465	19465	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19466	19466	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19467	19467	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19468	19468	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19469	19469	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19470	19470	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19471	19471	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19472	19472	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19473	19473	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19474	19474	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19475	19475	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19476	19476	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19477	19477	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19478	19478	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19479	19479	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19480	19480	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19481	19481	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19482	19482	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19483	19483	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19484	19484	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19485	19485	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19486	19486	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19487	19487	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19488	19488	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19489	19489	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19490	19490	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19491	19491	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19492	19492	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19493	19493	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19494	19494	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19495	19495	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19496	19496	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19497	19497	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19498	19498	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19499	19499	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	
19500	19500	Global Housecall	1	Run Once		5/1/2013 11:00 AM	Success	

To display active jobs only, select the Show Active Jobs check box.

Your other options here are:

- Add New Schedule
- Edit Schedule
- Edit Generation Parameters
- View Report
- Delete Schedule
- Refresh

Some of these functions remain grayed out and unavailable until "activated" for use when you click a schedule.

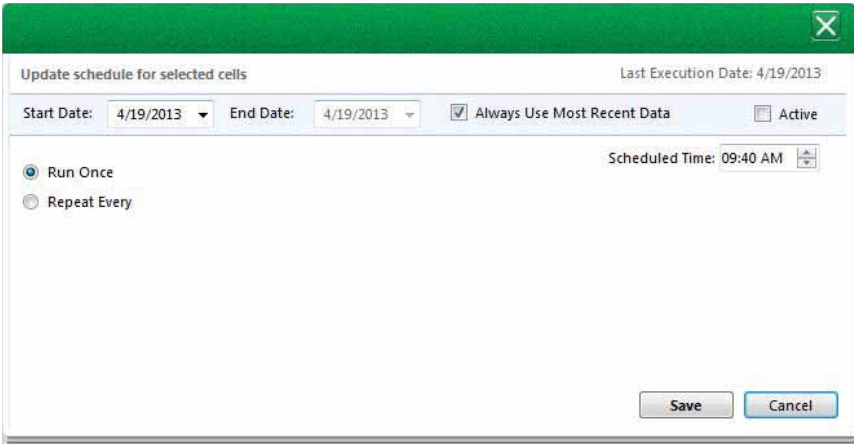
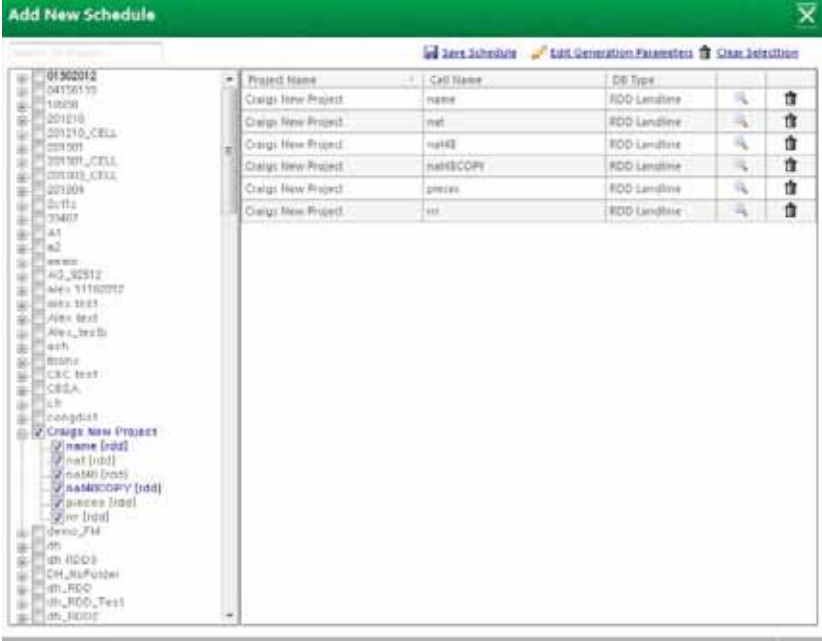
To create a new schedule, click Add New Schedule.

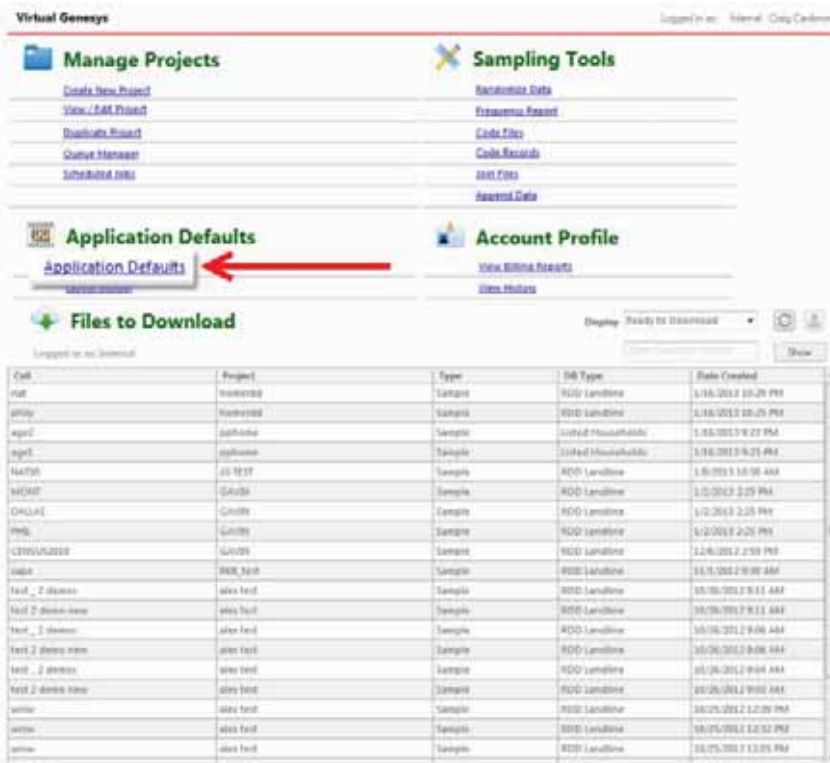
To edit a schedule, click one of the jobs to highlight it, then click Edit Schedule.

To edit the generation parameters, click the job you want, then click Generation Parameters.

To view the report for a job, click the job you want, then click View Report.

To remove a job, select that job, then click Delete Schedule.





These defaults are carried into the project when it is created. They can be changed at either the project or cell level. Every sample file will have the same defaults.

To see a report, click View. The Definitions Report opens.

The screenshot shows a window titled "Definitions Report" with a toolbar at the top. The main content area displays the following information:

Listed Households Definitions Report (Listed Households client default)

Customer Number: 300000
Customer Name: Internal

Geographic Filters
Not Defined

Demographic Filters
Not Defined

Sample Options
Full Sample: number of pieces Not Defined
Create Replicates
Number of Replicates: 1
Starting Replicate Number: 1
Records Must Have Phone Number
Include Records with Incomplete / Missing Addresses
Select Fields for Frequency Report
State
Layout Format: Standard
Save As: Text (ASCII)

Deduplication Options
All Available Cell(s) in Project

Page 1 of 1

To modify the defaults, click Edit. The Default Summary Information window opens.

The screenshot shows a window titled "Listed Households defaults for client 300000" with a green header bar. The main content area displays the following information:

Default Summary Information

Geographic Filters
Not Defined

Demographic Filters
Household Composition
Not Defined
Specify Age and Gender
Not Defined
Race
Not Defined
Income
Not Defined

Sample Options
Layout Format: Standard

Buttons: Save, Close

Configure as needed.

Layout Builder

On the Start Page, click Layout Builder.



The Layout Builder window opens.



Use Layout Builder to do several things with layouts:

- Add New Layout
- View
- Copy
- Edit
- Delete

To add a new layout, click Add New Layout. The Add New Sample Layout window opens.

Add New Sample Layout

This section allows you to create a custom output layout. Name the layout so you can find and reuse it easily.

Layout Name: DB Type: **RDD (Landline) Sample**

Output Delimiter: ☒ Fixed Width ☐ Comma ☐ Semicolon ☐ Tab ☐ Space ☐ Other

Available Fields ☐ Show RDD Fields only

Length	Field Name
10	Phone Number
1	Time Zone
3	Replicate
5	LHH
5	Assignments
5	Total Pop
5	Percent Listed
5	Household Density
5	RPS
2	State
20	City
5	CBSA Code
1	Metropolitan
1	Metropolitan
4	MSA
1	Met Status

Output Order

Field Name	Start	End
------------	-------	-----

Save Clear Cancel

Configure as needed. Your options for output delimiters are:

- Fixed Width (default)
- Comma
- Semicolon
- Tab
- Space
- Other

Drag from Available Fields to Output Order. To change the order of items listed under Output Order, just drag them.

Click View to see the Layout Report.

Layout Report

Layout Definitions Report
RDD (Landline) Sample

Customer Number: 300000
Customer Name: Internal
Layout Name: test
Delimiter: NONE

Field Name	Start	End	Length	UDF Value
Phone Number	1	10	10	
Time Zone	11	11	1	
Replicate	12	14	3	
LHH	16	19	5	
Assignments	20	24	5	
RPS	25	29	5	
Percent Listed	30	34	5	
Household Density	35	39	5	
User Defined Field 1	40	49	10	1234567890

Page 1 of 1

Friday, July 13, 2012 10:28
Created By: Craig Cardinon
Copyright © 2011-2012 Marketing Systems Group

Functions here include exporting as an Excel file, as a PDF, and printing.

Click Copy to copy a current layout. The Copy Sample Layout window opens.

Copy Sample Layout TEST

This window allows you to create a custom output layout. Name the layout so you can find and reuse it easily.

Layout Name: DB Type: RDD (Landline) Sample

Output Delimiter: ☒ Fixed Width ☐ Comma ☐ Semicolon ☐ Tab ☐ Space ☐ Other

Available Fields ☐ Show RDD Fields only

Length	Field Name
10	Phone Number
1	Time Zone
5	Replicate
5	LHM
5	Assignments
5	Total Rep
5	Percent Listed
5	Household Density
5	FBS
2	State
20	City
5	CBSA Code
1	Metropolitan
1	Micropolitan
4	MSA
1	Met Status

Output Order

Field Name	Start	End	Length	UDF Value
Phone Number	1	10	10	
Time Zone	11	11	1	
Replicate	12	14	3	
LHM	15	19	5	
Assignments	20	24	5	
FBS	25	29	5	
Percent Listed	30	34	5	
Household Density	35	39	5	
User Defined Field 1	40	49	10	1234567890

Save Clear Cancel

Configure as needed. Your options for output delimiters are:

- Fixed Width (default)
- Comma
- Semicolon
- Tab
- Space
- Other

Drag from Available Fields to Output Order. To change the order of items listed under Output Order, simply drag them. Remember to Save your changes.

Click Edit to edit a current layout. The Edit Sample Layout window opens.

Edit Sample Layout "TEST"

This section allows you to create a custom output layout. Name the layout so you can find and reuse it easily.

Layout Name: DB Type:

Output Delimiter:

☒ Fixed Width ☐ Comma ☐ Semicolon ☐ Tab ☐ Space ☐ Other

Available Fields ☐ Show RDD Fields only

Length	Field Name
10	Phone Number
1	Time Zone
3	Replicate
5	LMI
5	Assignments
5	Total Pop
5	Percent Listed
5	Household Density
5	FPS
2	State
20	City
5	CBSA Code
1	Metropolitan
1	Microregion
4	MSA
1	Met Status

Output Order

Field Name	Start	End	Length	UDP Value
Phone Number	1	10	10	
Time Zone	11	11	1	
Replicate	12	14	3	
LMI	15	19	5	
Assignments	20	24	5	
FPS	25	29	5	
Percent Listed	30	34	5	
Household Density	35	39	5	
User Defined Field 1	40	49	10	1234567890

Save Clear Cancel

Configure as needed. Your options for output delimiters are:

- Fixed Width (default)
- Comma
- Semicolon
- Tab
- Space
- Other

Drag from Available Fields to Output Order. To change the order of items listed under Output Order, just drag them. Remember to Save your changes.

Under Import Records:

- Click the Get File button to find a file
- Click the Delimited button to select either Delimited or Fixed Field
- Your options in the record Delimiter list are:
 - Comma
 - Space
 - Tab
 - Semicolon
 - Pipe
 - Other
- If necessary, select the option for First Line Contains a Header.
- Preview the file
- Then click the Import button

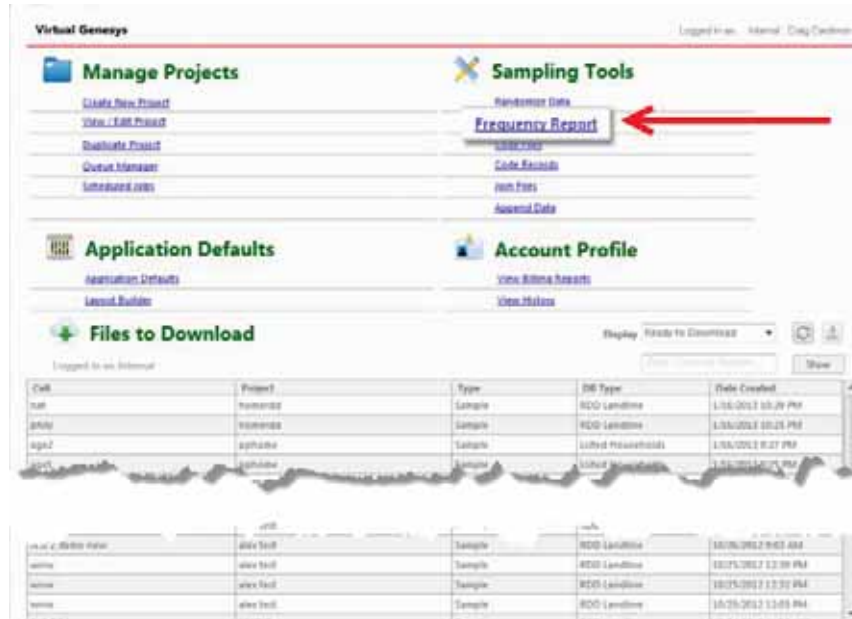
Under Randomize, once you have imported a file, your options are:

- Sort Ascending OR Sort Descending
- Sort as String OR Sort as Number
- Only Sort OR Randomize & Sort

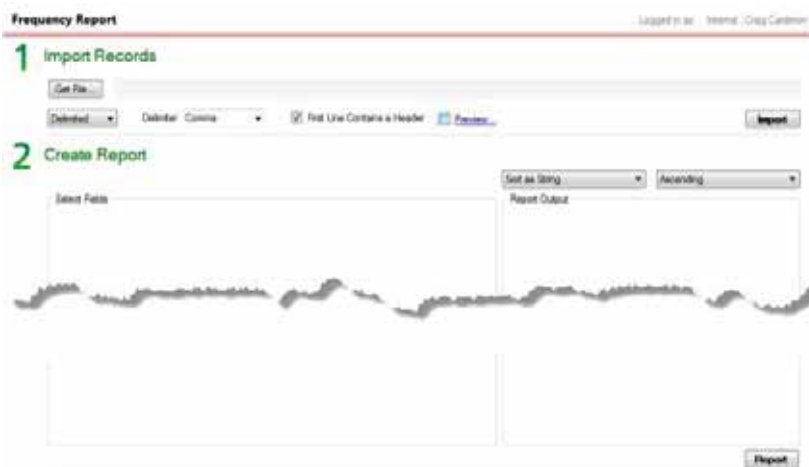
When ready, click Randomize.

Frequency Report

Under Sampling Tools, click Frequency Report.



The Frequency Report window opens.



Under Import Records:

- Click the Get File button to find your file
- Click the Delimited button to select a file that is either Delimited or Fixed Field

- Your options for the record Delimiter are:
 - Comma
 - Space
 - Tab
 - Semicolon
 - Pipe
 - Other
- If necessary, select the option for First Line Contains a Header
- Click Preview to preview the file
- Then click the Import button
- Parse the file as needed, then click Apply

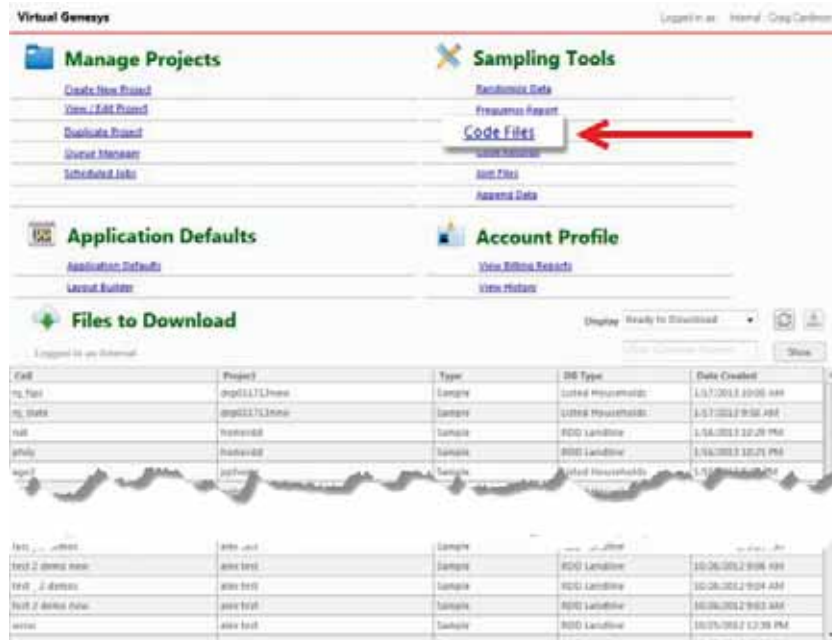
Under Create Report, once you have imported a file, your options are:

- Sort as String (default) OR Sort as Number
- Ascending (default) OR Descending

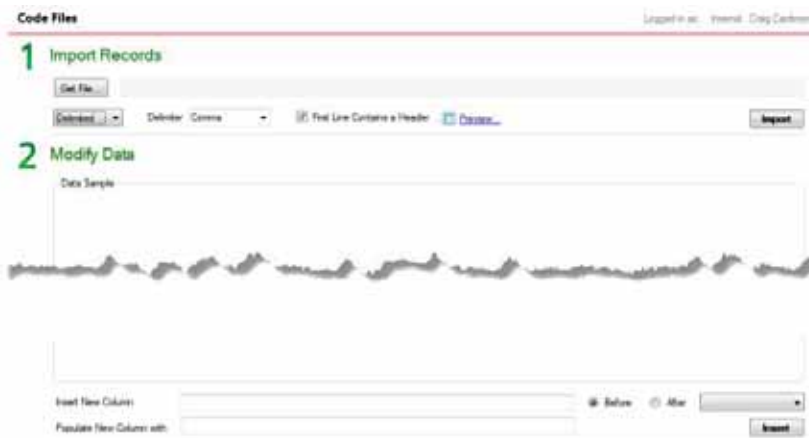
When ready, click Report.

Code Files

Click Code Files.



The Code Files window opens.



Under Import Records your options are:

- Click the Get File button to find your file
- Click the Delimited button to select either Delimited or Fixed Field
- Your options for the record Delimiter are:
 - Comma
 - Space
 - Tab
 - Semicolon
 - Pipe
 - Other
- If necessary, select the option for First Line Contains a Header
- Click Preview to preview the file
- Then click the Import button
- Parse as needed, then click Apply

Under Modify Data:

- To "Insert New Column," type the name of the new column into the box
- To "Populate New Column with," type the contents of the new column into the box
- Decide where you want to place the new column, as in Before (default) or After the First, Second, Third, etc., column. The choice defaults to the last column.

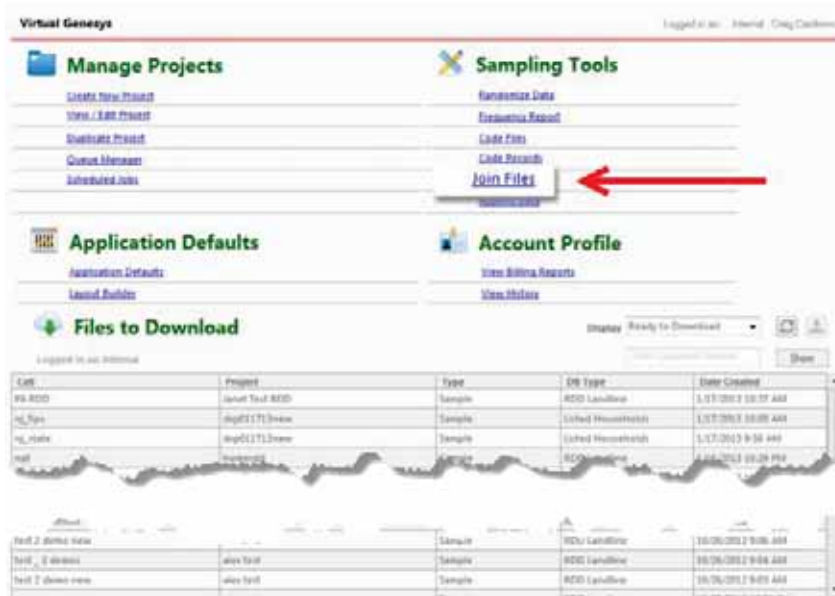
When finished, click the Insert button.

- Your options for record Delimiter are:
 - Comma
 - Space
 - Tab
 - Semicolon
 - Pipe
 - Other
- In necessary, select the option for First Line Contains a Header
- Click Preview to preview the file
- Then click the Import button

Under Modify Data:

- Click In Column to select the column where you're going to change data, the First, Second, Third, etc.
- Click Find and Replace for help in locating and replacing data OR click Import From File to import data
- To add another column:
 - Select the option to Insert New Column
 - Type the name of the new column into the box where it says, "NewColumn."
 - Decide where you want to place the new column, as in Before or After (default) the First, Second, Third, etc., column. The choice here defaults to the last column.

When you're finished, click the Recode button.



Click the **Get File** button to find your file.

- Click the Get File button to find your file
- Click the Delimited button to select either Delimited or Fixed Field
- Select multiple contiguous files by holding down the SHIFT key and clicking
- Select multiple files spread out from each other by holding down the CTRL key and clicking
- Your options for record Delimiter are:
 - Comma
 - Space

- Tab
- Semicolon
- Pipe
- Other
- If necessary, select the option for First Line Contains a Header
- Click Preview to preview the file
- Then click the Import button

Under Join Files:

In this example, you can see two test files lined up for joining.

2 Join Files

File Name	Field Count	Record Count
test1.txt	3	4
test2.txt	3	4
Total Records		8

☒ Remove Headers

Under Export Records:

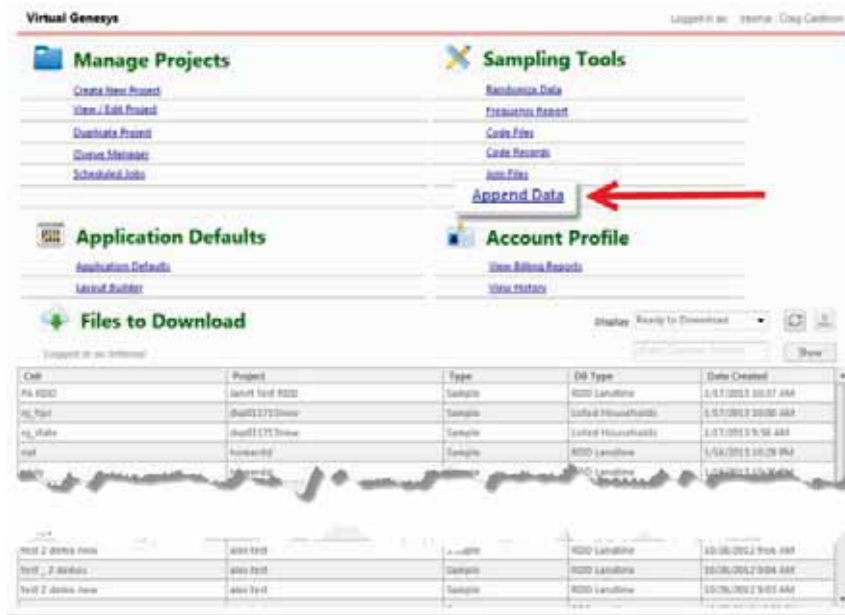
In this example, you can see the newly named join file. Change the name if need be. Otherwise, click the Save As button to save the file with the name given.

3 Export Records

Save As... C:\Users\craig.MSG_MASTER\Downloads\test_joined.txt Export

Append Data

Click Append Data.



The Append Data window opens.

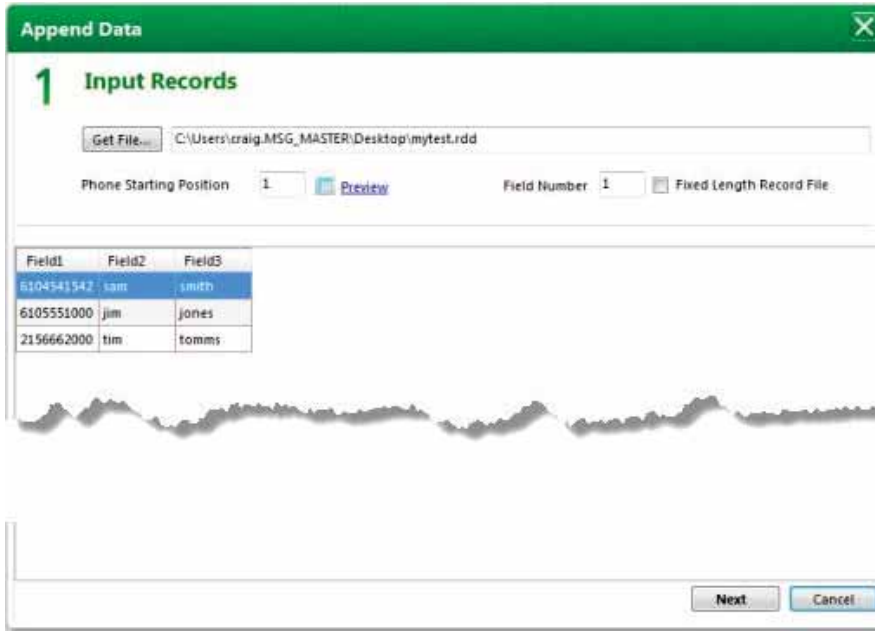
The 'Append Data' window is displayed. It features a green header bar with the title 'Append Data'. Below the header, there is a section titled '1 Input Records'. This section contains a 'Get File...' button, a 'Phone Starting Position' dropdown set to '1', a 'Preview' button, and a 'Select DB Type for Append' section with radio buttons for 'RDD Landline' (selected) and 'Cellular'. At the bottom right, there are 'Next' and 'Cancel' buttons.

Click the Get File button to find your file

If your Phone Starting Position is not "1" (default), be sure to change it

Make sure either RDD Landline or Cellular is selected for "Select DB Type for Append."

Click Next.

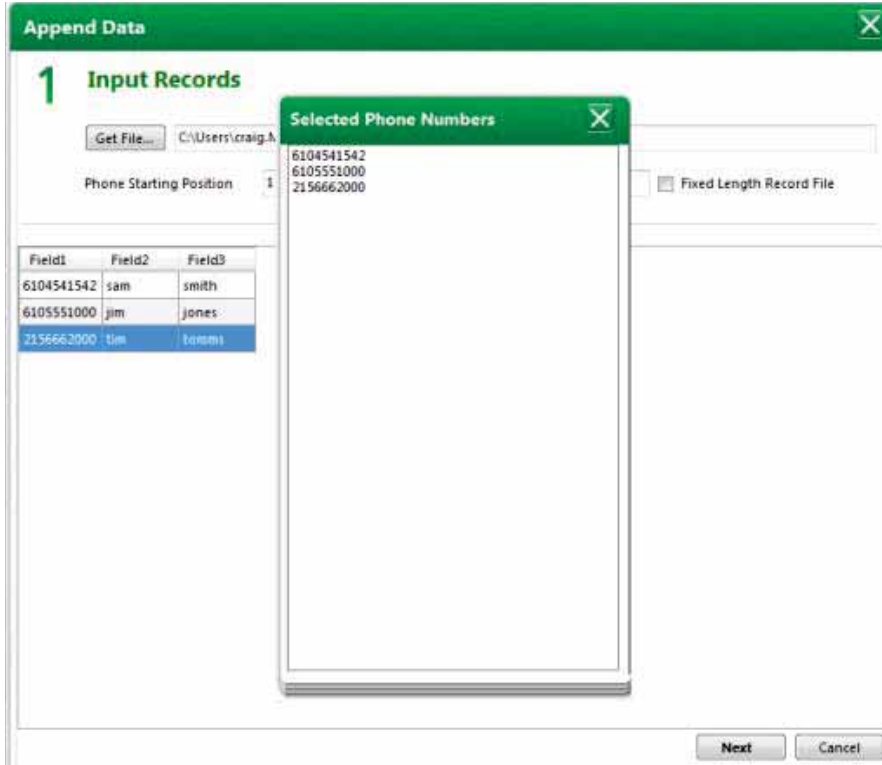


The 'Append Data' window has a green header bar with the title 'Append Data' and a close button. Below the header, the section '1 Input Records' is displayed. A 'Get File...' button is followed by a text field containing the path 'C:\Users\craig.MSG_MASTER\Desktop\mytest.rdd'. Below this, there are two input fields: 'Phone Starting Position' with the value '1' and 'Field Number' with the value '1'. To the right of these is a checkbox labeled 'Fixed Length Record File'. A 'Preview' button is located between the two input fields. Below the inputs is a table with three columns: 'Field1', 'Field2', and 'Field3'. The table contains three rows of data. At the bottom right of the window are 'Next' and 'Cancel' buttons.

Field1	Field2	Field3
6104541542	sam	smith
6105551000	jim	jones
2156662000	tim	tomms

If your file contains fixed-length records, select the option for Fixed Length Record File.

Click Preview to preview the file. The Selected Phone Numbers screen opens for inspection. When ready, close the phone number screen.



This screenshot shows the same 'Append Data' window as before, but with a 'Selected Phone Numbers' dialog box open in the foreground. The dialog box has a green header bar with the title 'Selected Phone Numbers' and a close button. It contains a list of three phone numbers: '6104541542', '6105551000', and '2156662000'. The 'Append Data' window is partially obscured by the dialog box. The 'Next' and 'Cancel' buttons are still visible at the bottom right of the main window.

Click Next.

Append Data X

2 Select Fields for Appending

Check the fields you wish to append and then drag them in order you wish to append

Field Name	
<input type="checkbox"/> American Indian Pct	
<input type="checkbox"/> Asian Pct	
<input type="checkbox"/> Assignments	
<input type="checkbox"/> Black Pct	
<input type="checkbox"/> CBSA Code	
<input type="checkbox"/> CBSA Div Code	
<input type="checkbox"/> CD1	
<input type="checkbox"/> CD1 Percent	
<input type="checkbox"/> CD2	
<input type="checkbox"/> CD2 Percent	
<input type="checkbox"/> CD3	
<input type="checkbox"/> CD3 Percent	
<input type="checkbox"/> Census Division	
<input type="checkbox"/> Census Region	
<input type="checkbox"/> County Name	
<input type="checkbox"/> Daylight Savings	
<input type="checkbox"/> DMA	
<input type="checkbox"/> DMA Rank	
<input type="checkbox"/> Education < 9th Grade Pct	
<input type="checkbox"/> Education Associates Pct	

Under Select Fields for Appending, chose which fields you want to append to your file.

Select the fields you want to append to your file in no particular order. We show you how to order them in the next step.

Append Data X

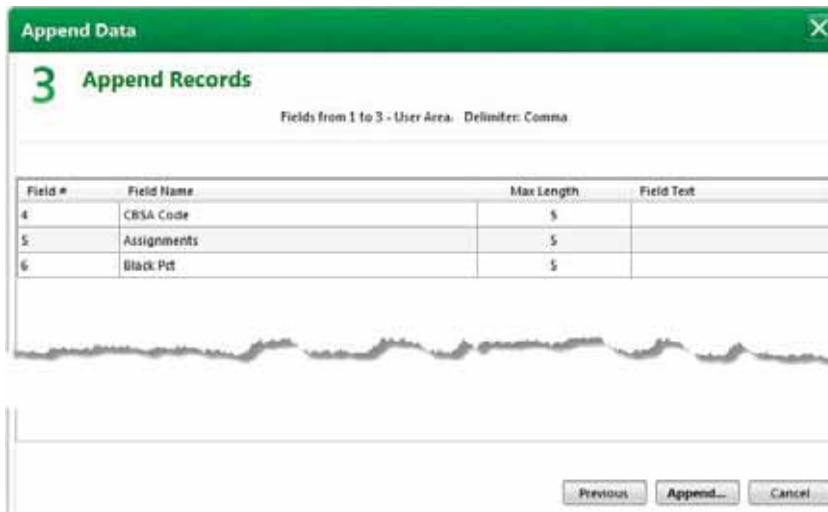
2 Select Fields for Appending

Check the fields you wish to append and then drag them in order you wish to append

Field Name	
<input checked="" type="checkbox"/> Assignments	1
<input checked="" type="checkbox"/> CBSA Code	2
<input checked="" type="checkbox"/> Black Pct	3
<input type="checkbox"/> American Indian Pct	
<input type="checkbox"/> Asian Pct	
<input type="checkbox"/> CBSA Div Code	
<input type="checkbox"/> CD1	
<input type="checkbox"/> CD1 Percent	
<input type="checkbox"/> CD2	
<input type="checkbox"/> CD2 Percent	
<input type="checkbox"/> CD3	
<input type="checkbox"/> CD3 Percent	
<input type="checkbox"/> Census Division	
<input type="checkbox"/> Census Region	
<input type="checkbox"/> County Name	
<input type="checkbox"/> Daylight Savings	
<input type="checkbox"/> DMA	
<input type="checkbox"/> DMA Rank	
<input type="checkbox"/> Education < 9th Grade Pct	
<input type="checkbox"/> Education Associates Pct	

As seen in the image above, the fields selected have been ordered 1, 2, 3, in the order in which they were selected. To put these field in another order, drag them where you want them. If you want number 3 to be in the number 1 spot, drag 3 up to the top.

Click Next. The Append Records screen opens, showing you the fields you have chosen to append.



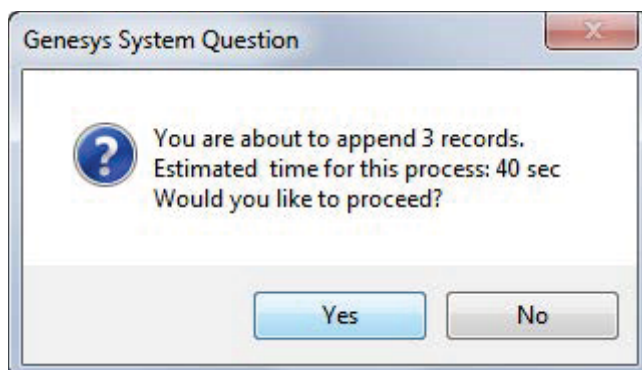
The screenshot shows a window titled "Append Data" with a green header. Below the header, it says "3 Append Records" and "Fields from 1 to 3 - User Area. Delimiter: Comma". There is a table with four columns: "Field #", "Field Name", "Max Length", and "Field Text". The table contains three rows of data:

Field #	Field Name	Max Length	Field Text
4	CBSA Code	5	
5	Assignments	5	
6	Black Pct	5	

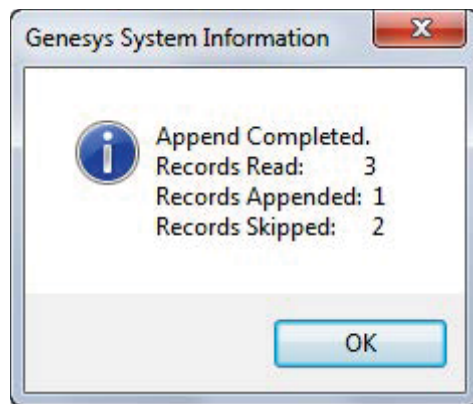
Below the table, there are three buttons: "Previous", "Append...", and "Cancel".

If you made a mistake, click Previous. Otherwise, click Append.

In the next window that opens, type in a name to save your file as, and select where you want to save it. Then click Save. At this point, you are asked if you want to proceed.



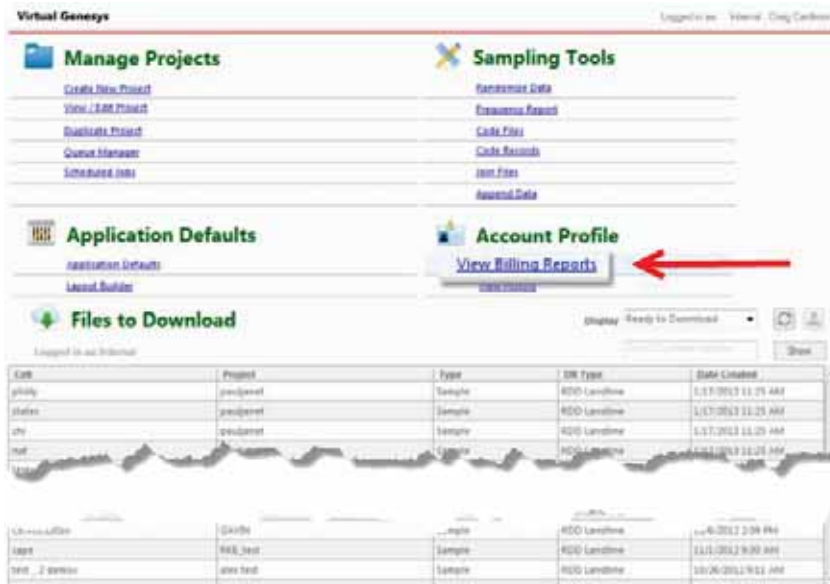
Click Yes to proceed or No to stop. If you click Yes, a message tells you how much appending was done.



Click OK.

View Billing Reports

To see the billing reports, click View Billing Reports.



The Client Billing Report opens.



Only internal customers see the section of the report containing the Show button. To see it function, enter a Customer Number into the box adjacent to the Show button, then click the button or press Enter. The Show button displays the name of the customer across the top for internal users. External users have no reason to change customer numbers, so this functionality is hidden. And every Customer Number must have six digits, or you see the error message, "123456 is an invalid customer number."

Under Select Report Parameters, select the From Date and To Date for your report. Click the calendar icon to see an expanded calendar.

Client Billing Report

Select Report Parameters, View Report

From Date Thursday, January 17, 2013 To Date Thursday, January 17, 2013

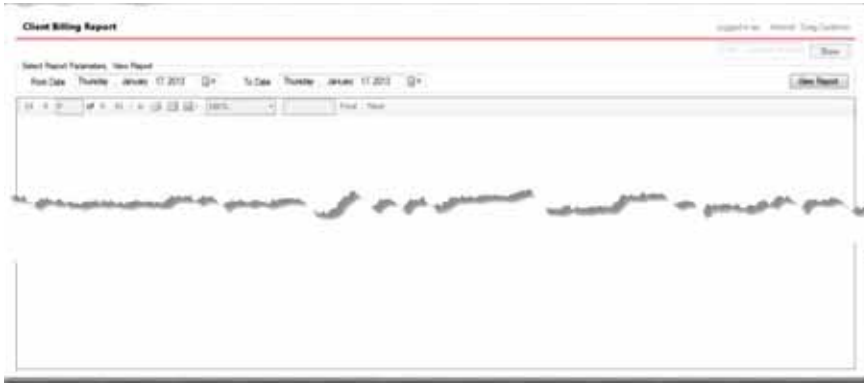
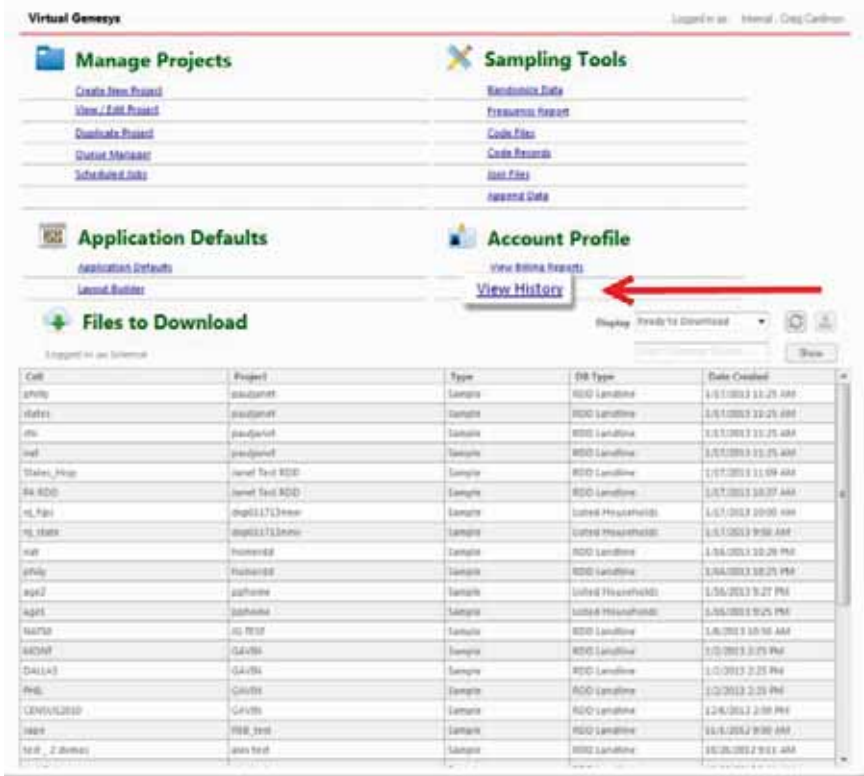
January, 2013

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

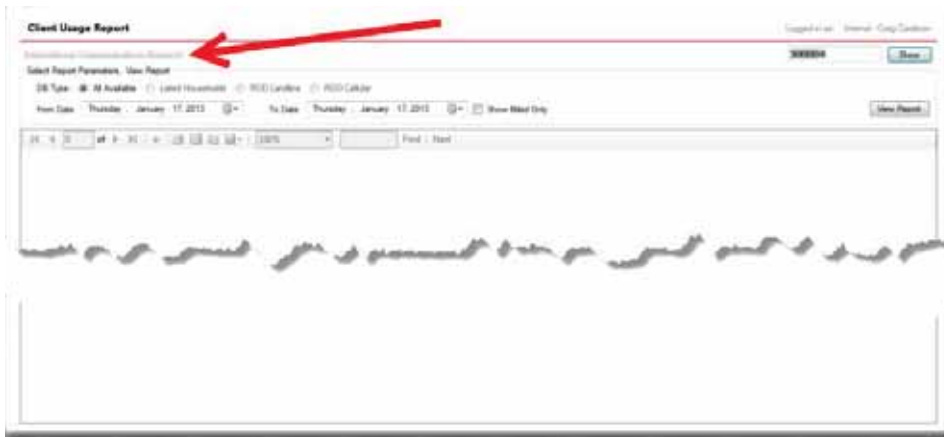
Today: 1/17/2013

Find | Next

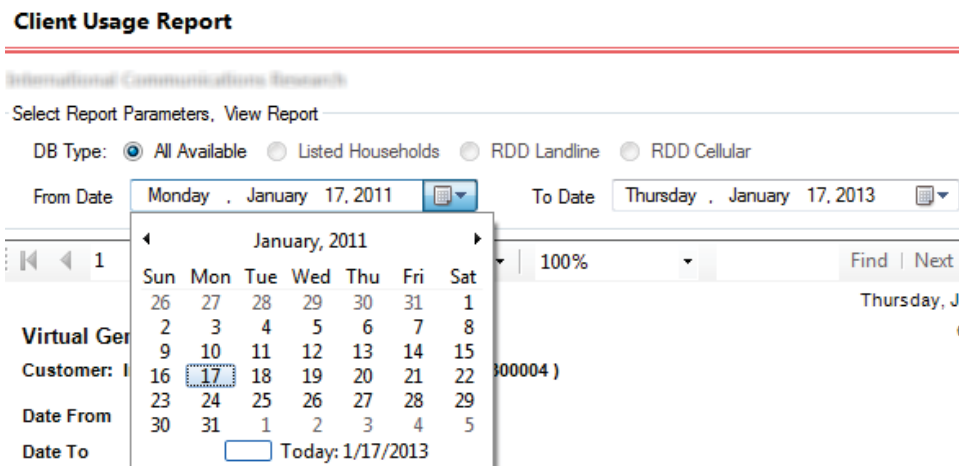
When you're ready, click View Report.



Number must have six digits, or you see the error message, "123456 is an invalid customer number."

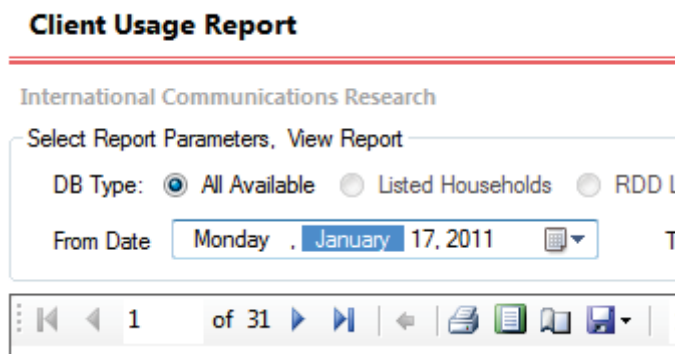


To see certain dates, click the calendar icon to choose specific dates.



To plug in a month, date, or year, click inside the box displaying the date, on top of the element you want to change.

To type in another month, click the month.



- Print
- Print Layout
- Page Setup
- Export to Excel or PDF

Cells

Any cells you have are listed under Cells.

Cell(s) [Click Here to Add New Cell](#)

	Name	Created By	Created On	Type	Status		
1	test unduplication	Craig Cardmon	07/05/12 07:50	Listed Households	Edit Mode		
2	name	Craig Cardmon	07/05/12 08:02	Landline	Edit Mode		
3	matrix cell	Craig Cardmon	07/05/12 08:21	Listed Households	Edit Mode		
4	Craig's New Cell	Craig Cardmon	07/05/12 07:56	Listed Households	Edit Mode		

Functions are available to:

- Click Here to Add New Cell
- Copy Cell Within a Project
- Show Cell Definitions Report
- Delete Current Cell
- Submit Cell to the Queue

Cell(s) [Click Here to Add New Cell](#)

	Name	Created By	Created On	Type	Status		
1	test unduplication	Craig Cardmon	07/05/12 07:50	Listed Households	Edit Mode		
2	name	Craig Cardmon	07/05/12 08:02	Landline	Edit Mode		
3	matrix cell	Craig Cardmon	07/05/12 08:21	Listed Households	Edit Mode		
4	Craig's New Cell	Craig Cardmon	07/05/12 07:56	Listed Households	Edit Mode		

Annotations in the image:

- Copy cell within a project (points to the copy icon in row 1)
- Cell Definitions Report (points to the report icon in row 2)
- Delete the cell (points to the delete icon in row 3)
- Submit to the queue (points to the submit icon in row 4)

Click Here to Add New Cell

See "Create a New Cell" on page 18.

Copy Cell Within a Project

To copy a cell within a project, click the icon. When the copy screen opens, type in the new name for cell. Click Save.

Copy selected cell within project 'Craigs New Project'

NameCraigs New Cell

Description

Sample Type:

☐ RDD

☒ Listed Households Sample

Cell Type:

National Target

☐ 48 State National with DC

☐ 48 State National without DC

☐ 50 State National with DC

☐ 50 State National without DC

Custom Target

☒ Custom Geographic Definitions

Matrix Cell

☐

Save

Close

Cell Definitions Report

To open a Cell Definitions Report, click the  icon.

1 of 1

100%

Find | Next

Listed Households Cell Definitions Report

Thursday, July 05, 2012 16:25
Created By: Craig Carlinson

Customer Number:300000

Customer Name:Internal

Project Name:Craigs New Project

Cell Name:Craigs New Cell

Geographic Filters

Included

3 CBSA Code(s)

10180 Atlanta, GA

10420 Akron, OH

10500 Albany, GA

Demographic Filters

Household Compositions

Not Defined

Age and Gender

Not Defined

Race

Hispanic/Latino, applied incidence: 0 to 100

White, applied incidence: 0 to 100

Income

Not Defined

Sample Options

Pull Sample: All records

Create Replicates

Number of Replicates: 1

Starting Replicate Number: 1

Records Must Have Phone Number

Exclude Records with Incomplete / Missing Addresses

Select Fields for Frequency Report

Sex

Inferred Age 65+ Anyone

Layout Format: Standard

Save As: CSV (Comma delimited)


Deduplication Options

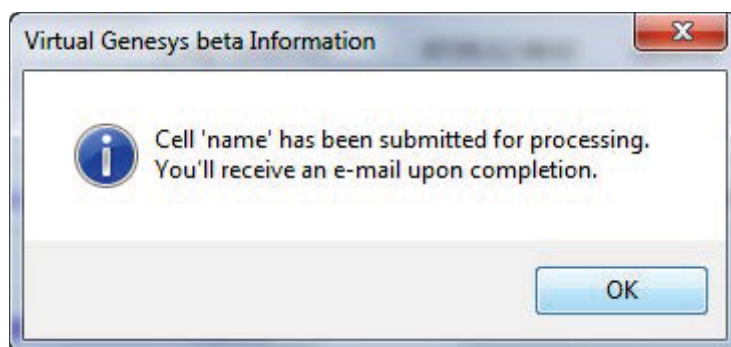
No Deduplication

Page 1 of 1

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Submit Cell to the Queue

To Submit a Cell to the Queue, click the Submit button  next to the cell to be processed. Answer the confirmation message. Another message says your cell has been submitted for processing. Click OK.



You will receive an email when processing is done.

Marketing Systems Group - Genesys Sampling Systems

Notification from Genesys - InfoUSA Listed Household on Thursday, July 5, 2012

Your sample order for 300000 - name for project Craigs New Project has completed processing. The order contains 1 records. Please use the Genesys sampling application to download your data.


For support contact your account representative or [Virtual Genesys Support](#)

Thanks,
InfoUSA Listed Household Team,
Marketing Systems Group

Ref: 300000-InfoUSA LHH-970-4096-6175

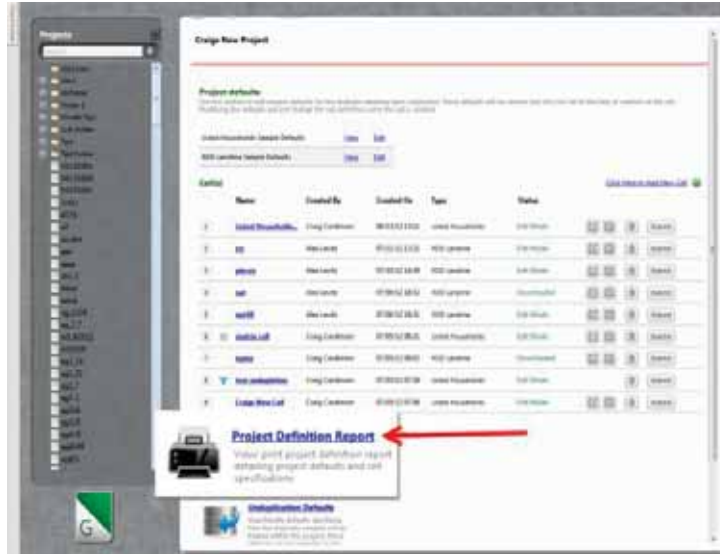
Please do not reply to this message, it is an auto-generated email.
If you have any questions contact MSG Support at 215-653-7100.

Delete Current Cell

To delete a cell, click the trash icon  adjacent to that cell. Click Yes when the confirmation message opens. Your cell will be deleted.

Project Definition Report

To see your Project Report, click Project Definition Report from your project page.



The Project Definition Report is generated and opened.

Project Definitions Report

Customer Number : 300000
Customer Name : Internal
Project Name : Craig's New Project
DB Type : RDD, Listed Household Sample

Project Defaults

DB Type: RDD

Geographic Filters

Not Defined

Sample Options

Generation Methodology: RDD

Working Bank Threshold: 1

Ref Sample: 1 records

Create Replicates

Number of Replicates: 50

Starting Replicate Number: 1

Select Fields for Frequency Report

County Name

Replicate

Time Zone

FIPS

Layout Format

Layout Name: MSG DEFAULT

Delimiter: NONE

List of Fields

Phone Number

FIPS

DAM

DMA Rank

Census Division

Census Region

Met Status

DAM Size

Time Zone

BSTID

Date Generated

CBSA Code

Metropolitan

Metropolitan

CBSA Div Code

Database Version

Generation Method

Replicate

Purging Options

Purge Against NewStar Data

Replace the purged numbers

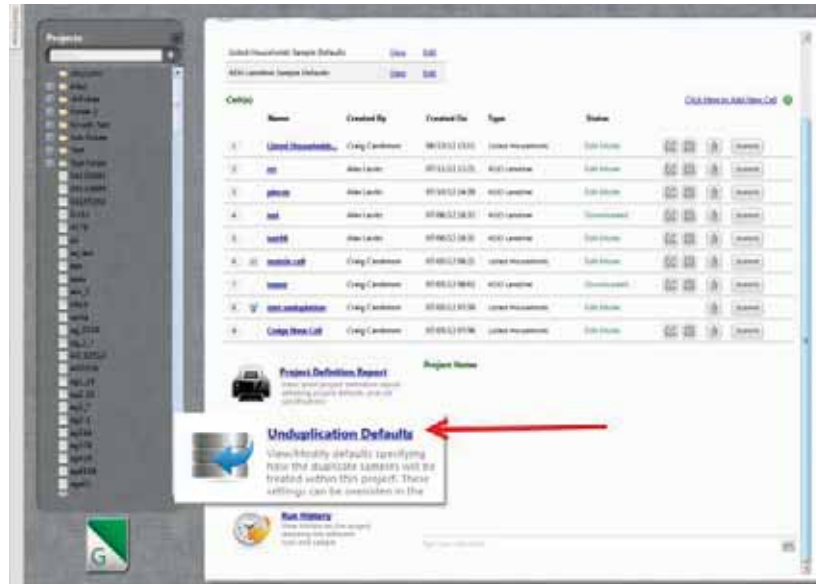
DB Type: Listed Households Sample

Here you have options to:

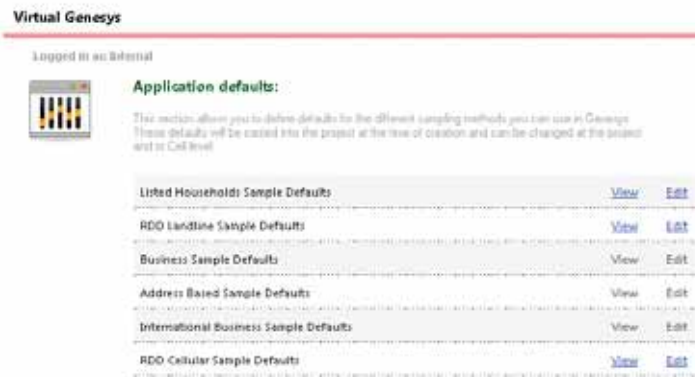
- Print
- Save
- Export in Excel or PDF

Unduplication Defaults

To see your unduplication defaults, click Unduplication Defaults.



This opens the Application Defaults tab.

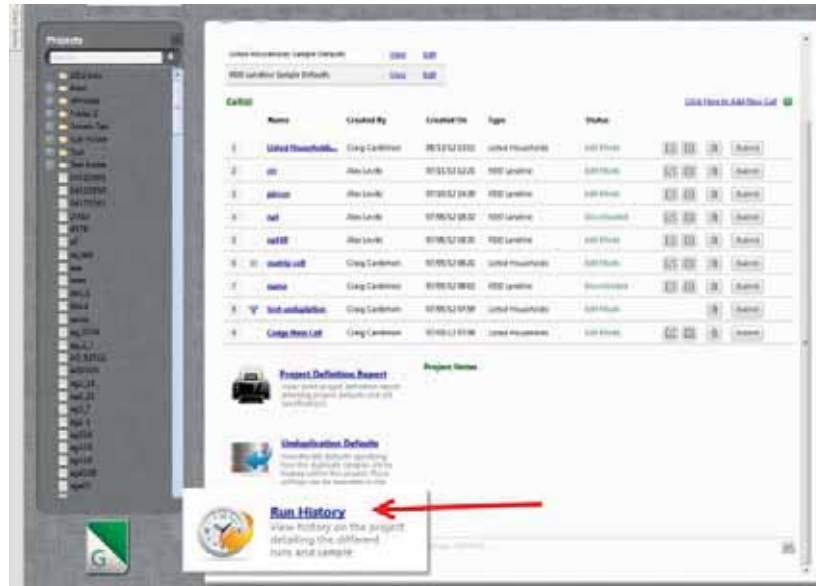


Use this window to view and modify the defaults that specify how the duplicate samples are treated within this project. Settings should be changed now if need be -- before submitting any cells or creating any pulls. These settings can be overridden at the cell level. The option to unduplicate All Available Cells in this Project is set as the default.

Be sure to Save any changes and then Close.

Run History

To see a history report for your project, click Run History.



The History Report for your project opens.

Run History Report for project 'Craig's New Project'				
Submitted On	Submitted By	No of Pieces	Status	View History Report
name				
7/6/2012 10:52	Alex Levitz	948	Ready to Download	
7/6/2012 10:24	Alex Levitz	944	Downloaded	
7/6/2012 10:19	Alex Levitz	1	Ready to Download	
7/5/2012 11:35	Craig Cardinmon	1	Ready to Download	

To see a printable version of your history report, click View History Report.

Project Run History Report				
Thursday, January 17, 2013 13:02 Created By: Craig Cardinmon				
Customer Number	300000			
Customer Name	Internal			
Project Name	Craig's New Project			
Cell Name	Submitted On	Submitted By	Status	No of Pieces
name				
	7/5/2012 3:35:55 PM	Craig Cardinmon	Downloaded	1
	7/6/2012 10:19:15 AM	Alex Levitz	Downloaded	1
	7/6/2012 10:24:38 AM	Alex Levitz	Downloaded	944
	7/6/2012 10:52:51 AM	Alex Levitz	Downloaded	948
net				
	7/6/2012 4:29:34 PM	Alex Levitz	Downloaded	955
	8/22/2012 4:00:00 PM	Alex Levitz	Downloaded	1

Your options here include:

- Print
- Save
- Export as Excel or PDF

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50 State National with DC 19
50 State National without DC 19

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