



Unified Enterprise Survey - Annual

2007 Annual Retail Chain Survey

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PERQS (Personalized Electronic Reporting Questionnaire System)

User Guide for Electronic Data Reporting

FOR

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What's new for 2007:

- CD-ROMs have replaced diskette(s) as the medium of delivery for the pre-loaded encrypted Excel spreadsheets.
- To assist users of Excel 2007, an Appendix D has been added.



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PERQS – User guide for electronic data reporting

About PERQS

Welcome to Statistics Canada's electronic data reporting system for the 2007 Annual Retail Chain Survey. This system, referred to as PERQS (Personalized Electronic Reporting Questionnaire System), is comprised of pre-loaded encrypted Excel spreadsheets on the supplied Company Data CD-ROM. PERQS allows you to decrypt the spreadsheets to get started, then encrypt the completed spreadsheets before sending them back to Statistics Canada via the Internet (see page 12, Returning your Company Data to Statistics Canada).

Information from your previous year's report: (business name(s), addresses, square footage, contacts, reporting period, etc.) has been pre-loaded into PERQS.

Tools needed to use PERQS

PERQS was designed to run in a **Windows 95 or higher** environment and requires **Microsoft Excel 97 or higher**. If you do not have access to a PC with Windows installed on it, or if you do not have Microsoft Excel 97 or higher, you will not be able to use PERQS.

Do not install and use PERQS in a network environment since PERQS does not support this feature.

You will need:

- a CD-ROM reader;
- access to the Internet.

In order to read the Reporting Guide: 2007 Annual Retail Chain Survey and the NAICS (North American Industrial Classification System), you must install Adobe Acrobat reader. If you do not have Adobe reader installed, it is available as a download from www.adobe.com.

You should have received a package containing the following:

- one CD-ROM containing the PERQS application;
- one Company Data CD-ROM.

You should have also received a letter containing your **password**, a series of 9 randomly generated letters. This password is unique to each PERQS package and is needed to access the PERQS company data CD-ROM. If at any time you lose or forget your original password, please call our toll-free Help Line at **1-800-368-1582** for instructions.

If you do not wish to have PERQS pre-loaded with information from your previous report, please advise us.

Thank you for taking the time to respond to the 2007 Annual Retail Chain Survey.

Note to users:

Please uninstall any previous versions of PERQS from your system before installing the 2007 version of PERQS.

To uninstall previous PERQS versions from your PC's hard drive:

1. From the Windows **Start** menu, select **Settings**;
2. In the **Control Panel**, select the **Add/Remove Program** icon;
3. Select **STCDRF**;
4. Click **Remove**.

Installing the 2007 version of PERQS

To install PERQS onto your PC's hard drive:

1. Make sure all other applications are closed and start Windows;
2. Insert the PERQS application CD-ROM into the CD-ROM driver;
3. From the Windows **Start** Menu, select **Run**;
4. Enter **[CD-ROM drive letter]: Drf-ord.exe**;
5. Click on **OK**;
6. The **WISE** installation package will install PERQS to **C:\STCDRF**. If you wish to install PERQS elsewhere, you will be given the option during the installation process;
7. Once you have been notified that PERQS has been successfully installed, click on the **Finished** button;
8. The **PERQS 2007** icon will now appear on your desktop.

Decrypting the company data CD-ROM

1. Double-click on the **PERQS 2007** icon to start the application;
2. Once the application is loaded, please select your language of choice;
3. Select **Cryptography Facility** to decrypt the Excel spreadsheet(s) provided;
4. You will be prompted to **Insert your company data CD-ROM** into the CD-ROM driver;
5. Click **OK**;

Note: If the window displaying the contents of the CD-ROM opens automatically, please close this window in order to proceed.

6. You will be prompted to **Enter your password**;
7. At the prompt, select a destination directory for your decrypted files;
8. Please wait while PERQS decrypts the Excel spreadsheet information from the company data CD.
9. Once the files have been successfully decrypted, **Exit** from the data return facility.

If you have more than one CD-ROM, you will be prompted to insert the additional company data CD-ROM(s).

In addition to password protection, all pre-loaded data has been encrypted to ensure proper security during the transportation of the CD-ROM. During the loading of PERQS spreadsheets onto your PC, the system will automatically decrypt the data. Once the survey is completed and you are ready to send the data back to Statistics Canada, PERQS will automatically encrypt the information.

Opening PERQS

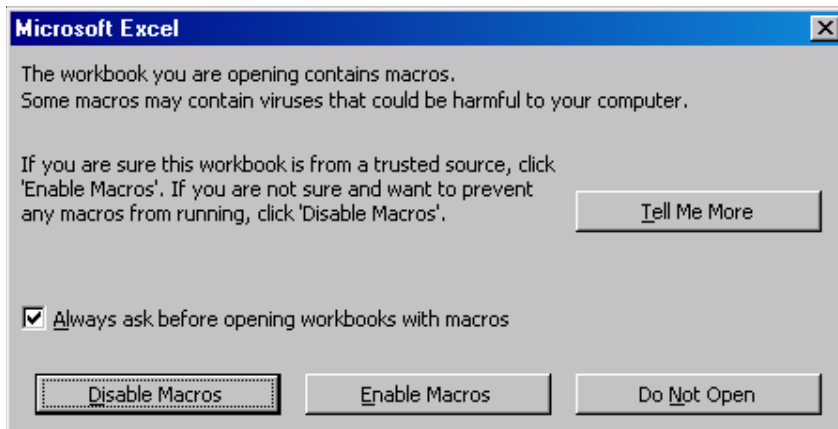
PERQS 2007 was developed using Microsoft Excel 97 and therefore requires that either Excel 97 or higher be installed on your PC.

When your customized questionnaire information on the company data CD-ROM is decrypted, please locate it using Windows Explorer and double click on it (Excel should automatically open your questionnaire).

Alternatively, open Microsoft Excel, and go to **File -> Open**. Locate the questionnaire using the Excel browser. When the questionnaire is opened, the following message (Figure 1A) will appear:

Note: For users of Excel 2007, see Appendix D: Using Excel 2007 to open the questionnaire and use the macros.


Figure 1A



Activate the user-friendly macros developed by Statistics Canada by clicking **Enable Macros**

Disabling macros will make it impossible to fill out the questionnaire. Instructions will appear on the screen, as shown in Figure 1B.

Figure 1B



Unified Enterprise Survey
2007 Annual Retail Chain Survey

This survey contains macros

Enabling macros on a workbook

This survey contains macros. In order for the survey to be accessed with all its functionality, please enable macros:

With Excel 97:

If an Excel message indicating that the workbook contains macros is displayed when opening the survey questionnaire, choose "Enable Macros".

With Excel 2000 / Excel XP:

Before opening the survey questionnaire, set your security level to medium.

- 1) Open "Tools"
- 2) Go to "Macros"
- 3) Select "Security" - "Security Level"
- 4) Select "Medium"

NOTE: If you are unable to change the Excel security level, contact your local network administrator.

If an Excel message indicating that the workbook contains macros is displayed when opening the survey questionnaire, choose "Enable Macros".

With Excel 2007:

- 1) Click "Options..." on the Message Bar.
- 2) When the security dialog box appears, choose the option to "Enable this content".

NOTE: Refer to the user guide to have more details about it.



You now have full access to PERQS which is made up of two Excel spreadsheets, identified as **Part A** and **Part B**. When the questionnaire is opened, **Part A** will be displayed. In the upper left hand corner you will see the Statistics Canada logo and the title **2007 Annual Retail Chain Survey**.

Completing Part A of the questionnaire

The questionnaire text in PERQS is black on a coloured background. The coloured boxes contain instructions, information and/or questions. The white boxes are reserved for your answers.

The easiest way to move through PERQS is to use the **Tab** key. It will take you from one white box to the next, from left to right and from top to bottom. This is the order in which you should answer the questions.

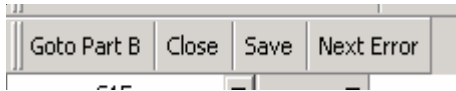
Shift +Tab enables you to go backwards. Using the **Enter** key is not recommended, as it does not allow you to go from one white area to the next; instead, the Enter key takes you to the cell below in the next row down.

Some white boxes may contain information collected in previous years. Please verify the information and make the necessary corrections. To change it, please overwrite the content of the cell by entering the corrections.

You will also see several additional buttons displayed on the menu (see Figure 1C). **Go to Part B** will move your cursor to the second Excel spreadsheet, entitled **Part B**. **Save** and **Close** closes the application (see **Closing the questionnaire** on page 11). **Save** saves the current session on your hard disk. **Next Error** moves your cursor to the next cell in error.

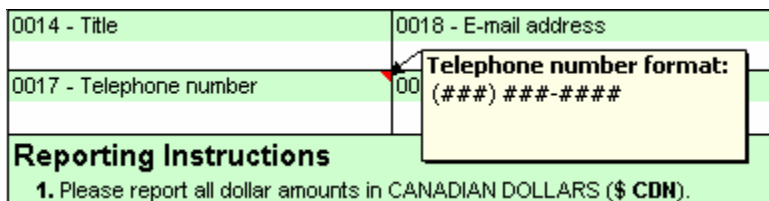
Note: For users of Excel 2007, see Appendix D: Finding additional buttons when accessing Part A and Part B of the questionnaire.

Figure 1C



Some cells may contain a small red triangle in the upper right hand corner. When you point your cursor over this red triangle, a dialog box containing additional information about this cell will appear (see Figure 2).

Figure 2



If PERQS assesses that the information collected is erroneous, the cell turns red. When you move your cursor over it, a dialog box containing the information of the erroneous cell will be posted (see **General Information** section).

You will have the option of coming back later by clicking the **Next Error** button at the top of the worksheet. **Next Error** will allow you to navigate between all the possibly erroneous cells in **Part A**.

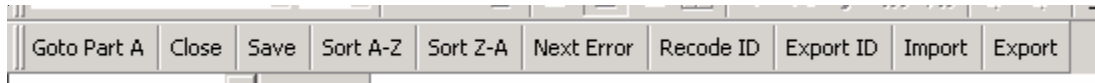
You may now complete **Part A** by following the instructions on the questionnaire. Once **Part A** is completed, please go to **Part B** by clicking the appropriate button on the top menu or by selecting the sheet tab entitled **Part B** at the bottom of the worksheet.

Completing Part B of the questionnaire

Part B is designed to capture detailed information on each retail chain store. Many additional buttons also appear in Part B (see Figure 3A).

Note: For users of Excel 2007, see Appendix D: Finding additional buttons when accessing Part A and Part B of the questionnaire.

Figure 3A



Go to Part A moves your cursor to the first Excel spreadsheet entitled **Part A**. **Close** closes the application, **Save** saves the current session on your hard disk and **Next Error** moves your cursor to the next cell in error.

Sort A-Z will allow you to sort the content of the selected column in alphabetical order. **Sort Z-A** will sort in the reverse order. Please note that you can only sort one column at a time.

Recode ID, **Export ID**, **Import** and **Export** are explained on page 10.

Part B is divided by store, and the information collected for each store is on the same line. As in **Part A**, the sheet already contains information collected over the years. To change it, simply overwrite the content of the cell by entering the corrections.

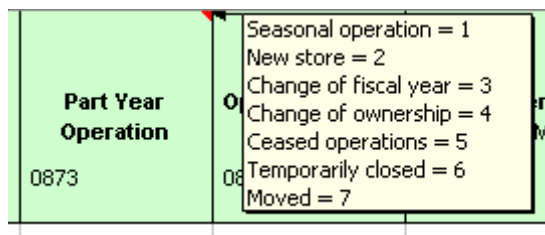
Columns containing store addresses and company IDs appear twice. Columns appearing in colour are protected and reserved for use by Statistics Canada for processing purposes. Use blank store address and company ID columns to update information.

To add a new location, use a new line at the bottom of the spreadsheet.

If a store has gone out of business, you must indicate this in the column headed **Part Year Operation**. This application does not allow you to delete stores.

For **Part Year Operation** (see Figure 3B), enter the number corresponding to the correct description. The numbers and their descriptions are available by moving the cursor to the top of the red triangle located in the header of the column as illustrated in Figure 3B.

Figure 3B



In **Part B**, it is recommended that you use the **Tab** key for browsing. By using the **Tab** key, you can move through all the boxes for the same store before moving to the next.

When **Part B** is completed, you can either return to **Part A** or save and close the questionnaire so that it can be sent to Statistics Canada (see Closing the questionnaire on page 11).

General information

Error message

Error messages identifying inconsistencies in your answers may appear at various points while you complete the questionnaire. Please read the messages and correct the erroneous information.

Also, when PERQS assesses that the data entry is erroneous, the cell turns red. When you move your cursor over the cell, a comment box containing the information on this erroneous cell is posted (see Figure 4A).

Figure 4A

Total Operating Revenue (CAN\$) 2080 0	Gross Leasable Area Indicate if area reported in : 0875 1 <input type="radio"/> Square feet 2 <input type="radio"/> Square metres 0876
-12	You must enter a number between 0 and 9999999999999999.

It is possible that some of your data will seem inconsistent according to PERQS. If this happens, explanations for particular questions may be provided in the comment box (see Figure 4B). Providing such explanations means that Statistics Canada might not have to contact you to obtain more details about the information.

Figure 4B

Comments

The number is low because ..

OK Cancel

You may also include additional comments in **Section G** of **Part A**.

Printing the questionnaire

To print your questionnaire select **Part A** or **Part B**. Then, select **File -> Print** in the Excel menu.

Since every printer has its own configuration, you may have to adjust your margins to print a presentable document. Also, in **Part B**, due to the amount of information included, we recommend that you use the new **Export** option for better printing capabilities.

Exporting and importing

Recoding ID and exporting ID

In **Part B** of PERQS you will see 2 buttons entitled **Recode ID** or **Export ID**. These PERQS buttons allow you to import and export data using Excel. This section will explain how to use these functions.

Exporting and changing the location number

Sometimes the number used to identify your locations can vary from one year to the next. PERQS allows you to overwrite the number directly in the questionnaire and gives you the option to import the number from another, pre-existing spreadsheet.

If you want to use the import option, create another Excel spreadsheet with two columns: one column containing the old identification number and another column containing the updates (see Appendix B).

Click on **Recode ID** and select the spreadsheet containing this information. PERQS will open the file and update the number of locations using the information collected.

If necessary, PERQS will allow you to export the identification numbers currently in your system to another Excel file. When you use the **Export ID** option, PERQS can create a new Excel file requesting the identification of a location for your new file. The new file is saved and you return to PERQS.

This new file will contain a complete list of numbers already in PERQS, as well as the names of columns already identified to facilitate the future import of these files.

For users with another spreadsheet program (such as Lotus), please refer to **Appendix C** for information on how to convert from Lotus to Excel.

Exporting and/or importing data

If you have most of the information required by the questionnaire in another Excel spreadsheet, PERQS gives you the option of importing this information.

To import information, you must have an Excel spreadsheet that has specific names for its columns in the first row (see Appendix A). The system will use the names of the rows to update the data.

To use the import function, click on **Import** and select the spreadsheet containing the updated information. PERQS will open the file and update the location data. It will use the identification number of the location to merge the spreadsheets.

When PERQS discovers new locations during the process (i.e., the ID number of the source file does not correspond to any record presently on PERQS), it will automatically add it to the end of the questionnaire.

PERQS will allow you to export the data presently in the system to another Excel file. When using the **Export** option, PERQS will create a new Excel file and ask you to identify a location for your new file through Explorer in Excel. The new file is saved and you return to PERQS.

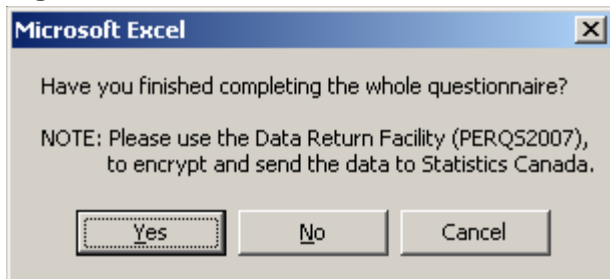
The new file will contain a complete list of numbers already in PERQS, as well as the names of already identified columns to facilitate future importation of these files. Columns labelled ADDRESS, CITY, PROVINCE and PCODE are blank white columns on your questionnaire.

For users with another spreadsheet program (such as Lotus), please refer to **Appendix C** for information on how to convert from Lotus to Excel.

Closing the questionnaire

Once the questionnaire is completed, click on the **Save** or on the **Close** button to save your changes or exit the questionnaire. When you click on this button, this window (Figure 5A) will appear:

Figure 5A



If the questionnaire is fully completed, click on **Yes** and the questionnaire with your information will be saved. Consistency errors in your questionnaire (see Figure 5B) will also appear. If you do not want to correct these errors, you can add a comment concerning these errors (see Figure 5C).

If you have not finished completing the questionnaire, click on **No** and the information will be saved. **Cancel** will take you back to the application.

Figure 5B

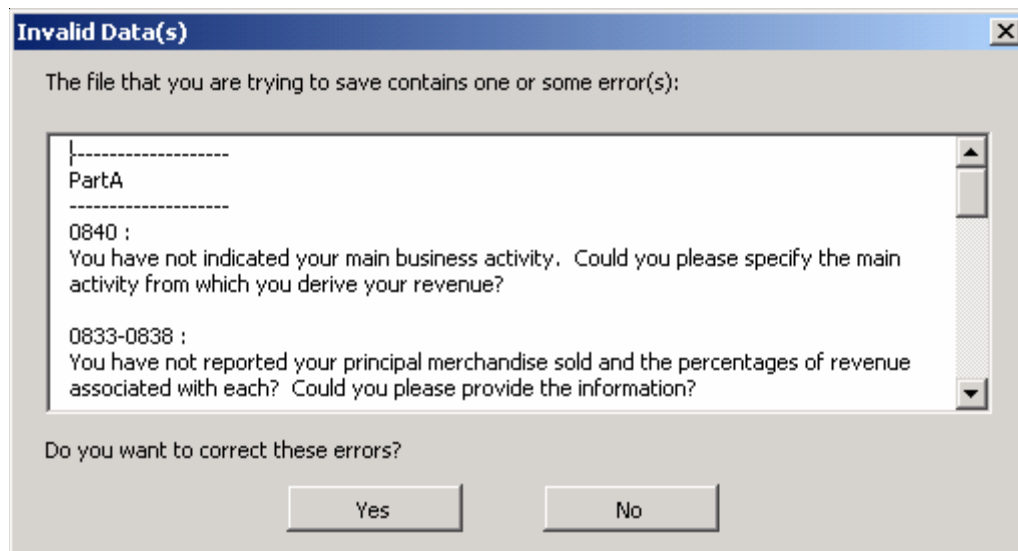
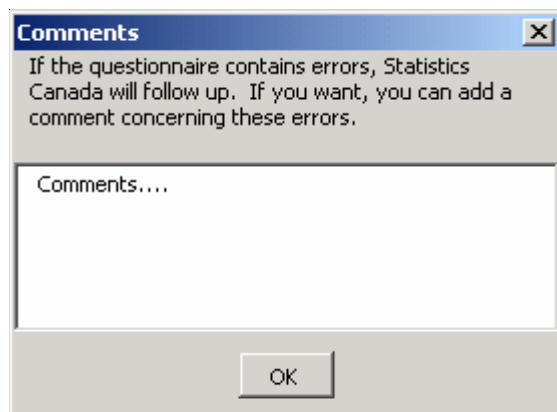


Figure 5C



Returning your company data to Statistics Canada via Internet

Once you have completed the survey and you are ready to return it to Statistics Canada via the Internet, you must execute the data return facility.

If either **FTP** or **e-mail** are not available, please call 1-800-368-1582 for further instructions prior to selecting **Save to Diskette** option in the data return facility.

Executing the data return facility once installed

1. Connect to the Internet;
2. Double-click on PERQS desktop icon;
3. Click on your language preference;
4. Select **Send Data to Statistics Canada**;
5. Select the completed file you want to send (e.g., **Q11111111.xls**);
6. Select the method of data transmittal **FTP Data to STC** or **E-mail Data to STC** (the selection of either method will automatically encrypt your data file).

If you select **FTP** click on the **Start Transfer** button.

If you select **E-mail**, you will be asked to **Change local mail options**.

Select **No** if you have a direct connection to the Internet. You will then be prompted to enter your email address.

If you do not have a direct connection to the Internet select **Yes**. You will then be prompted to enter the **Host Name** - name and address of your mail server. If your host name is unknown, please consult with your technical support group. The **From Name** is your e-mail address.

Removing PERQS from your computer once you are finished

Please make sure that you have transmitted your data to Statistics Canada or copied the data to the company data CD before you remove PERQS from your PC.

To uninstall PERQS from your PC's hard drive:

1. From the Windows **Start Menu**, select **Settings**;
2. In the **Control Panel**, select **Add/Remove Program**;
3. Highlight **STCDRF**;
4. Click **Remove**.

Appendix A

PERQS Import file record layout:

Column	Column Header	Description
Column 1	SNUMBER	Location ID (from Statistics Canada)
Column 2	COMPID	Location ID (do not exceed 8 characters)
Column 3	OPNAME	Operating name
Column 4	ADDRESS	Name of street
Column 5	CITY	City
Column 6	PROVINCE	Province or territory (2 characters)*
Column 7	PCODE	Postal code
Column 8	C2080	Total operating revenue
Column 9	C0876	Gross leasable area
Column 10	C0873	Part year operation (1 digit) 1: Seasonal operation; 2: New store; 3: Change of fiscal year; 4: Change of ownership; 5: Ceased operations; 6: Temporarily closed; 7: Moved
Column 11	C0871	Part year operation from (6 digits) yyyy/mm or leave blank
Column 12	C0872	Part year operation to (6 digits) yyy/mm or leave blank
Column 13	NAICS	NAICS (North American Industry Classification System) (6 digits)
Column 14	C9921	Comments

Numeric columns:

C2080, C0875, C0876, C0873, C0871 and C0872.

Abbreviations used for the provinces and territories:

Province	*Code	Province	*Code
Newfoundland and Labrador	NL	Saskatchewan	SK
Nova Scotia	NS	Alberta	AB
New Brunswick	NB	British Columbia	BC
Prince Edward Island	PE	Yukon	YT
Quebec	QC	North West Territories	NT
Ontario	ON	Nunavut	NU
Manitoba	MB		

Appendix B

To import data in PERQS, you must use Excel 97 or higher. In order for PERQS to import your data correctly, please indicate the names of the following columns in the first row of your Excel spreadsheet.

Record layout for importing new location number in PERQS:

	Column Header	Description
Column 1	OLDID	Old Location ID
Column 2	NEWID	New Location ID (do not exceed 8 characters)

Appendix C

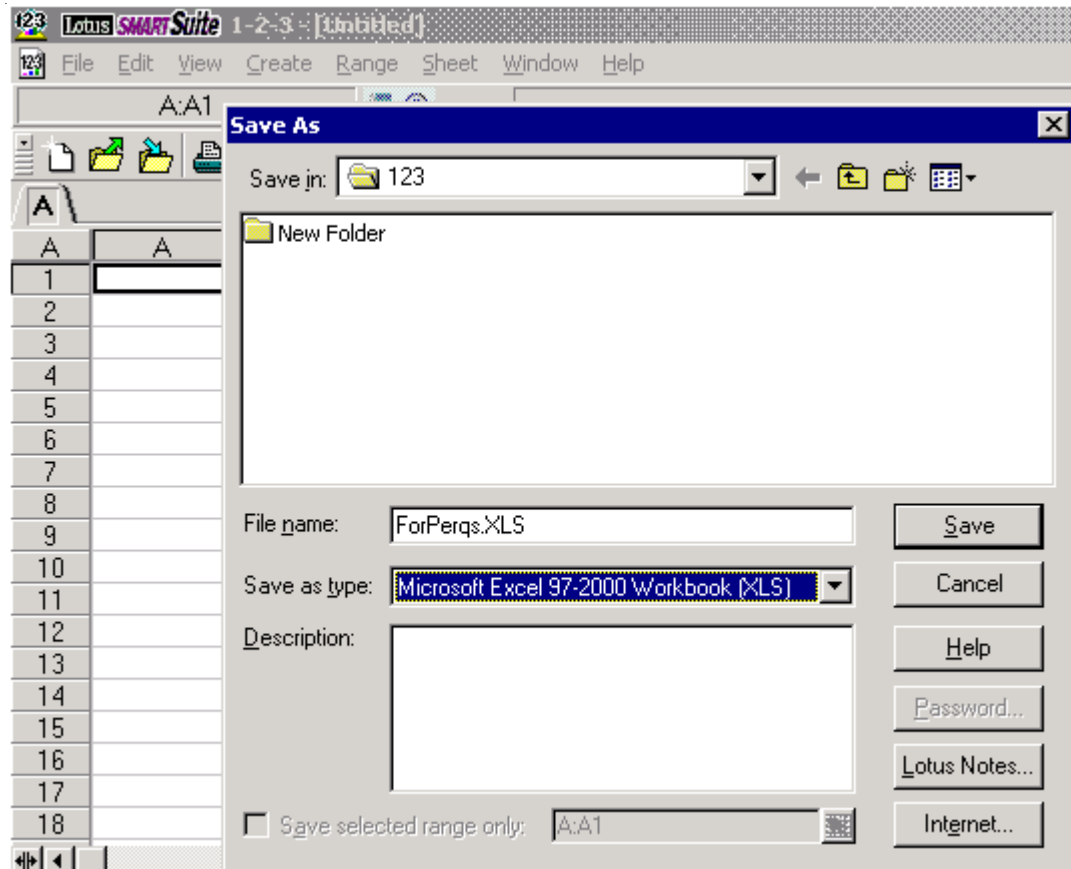
As mentioned in this guide, you may only import and export if your data currently exists in an Excel 97 spreadsheet or higher. However, if your data exists in a different format your software may convert to Excel. Conversion to Excel is possible for Lotus and Microsoft Access.

For users who have other types of software, please consult your software documentation to find out whether it is possible to convert to Excel 97 and follow those instructions.

Lotus to Excel

To convert from Lotus to Excel, you must use the command **Save under** and click on **File** in your Lotus tab. Please save the spreadsheet in Excel 97 format (see figure 6A).

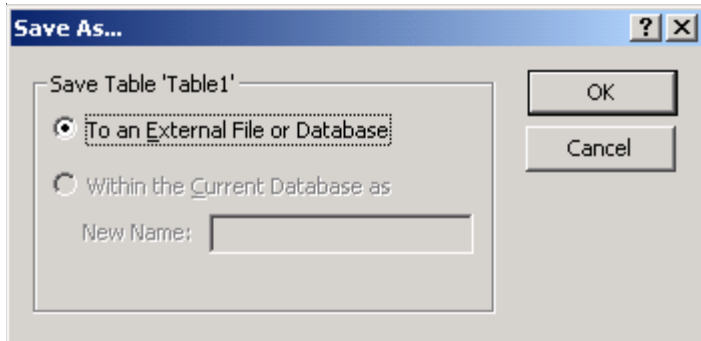
Figure 6A



Microsoft Access to Excel

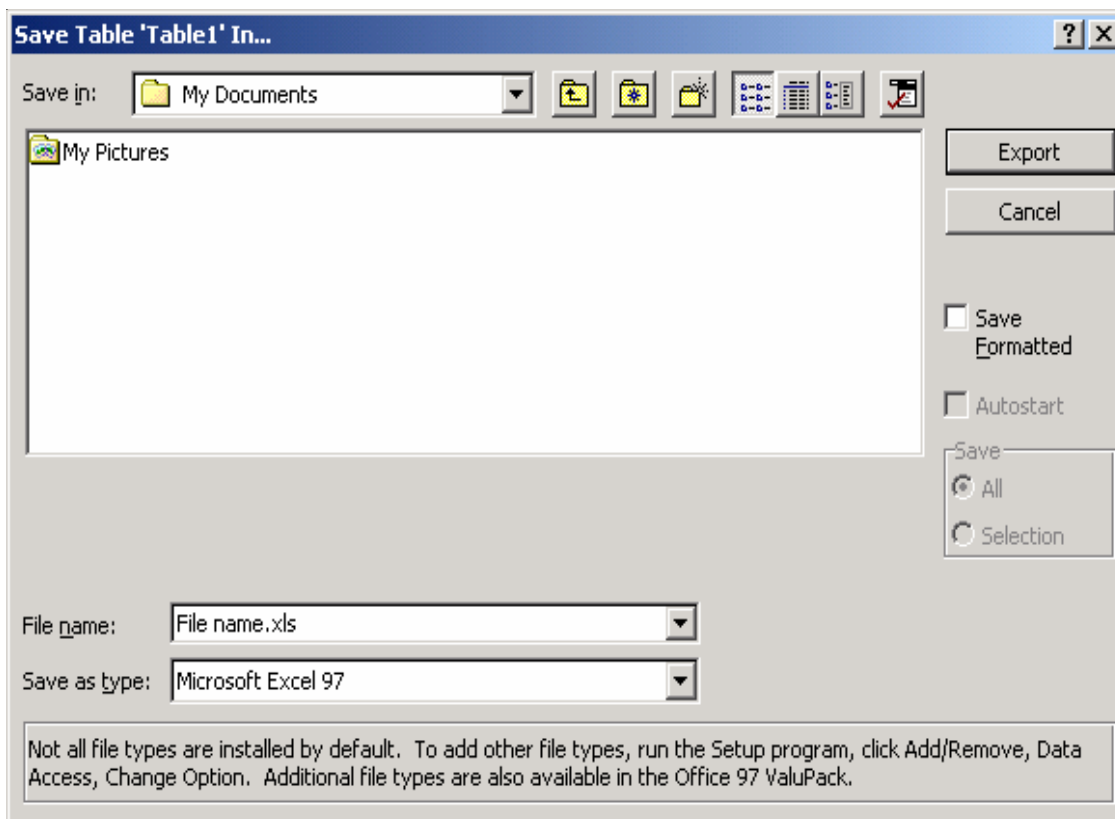
To convert from Microsoft Access to Excel you must select your data and use the command **Save as** under **File** on your toolbar (see Figure 6B).

Figure 6B



After choosing the option to save to the external file, you must save your data in Excel 97 format by selecting Microsoft Excel 97 (*.xls) as the type of file (see Figure 6C).

Figure 6C



Appendix D

Using Excel 2007 to open the questionnaire and use the macros

Open the questionnaire with the **Microsoft Office**  menu **Open**, and then find the questionnaire using the Excel explorer.

To activate the macros, use the **Options** buttons which will be found on the security warning tool bar (Figure 7A). Once the Microsoft Office Security Options window has open, choose the option: **Enable this content** (Figure 7B). This will open the questionnaire and data entry can begin.

Figure 7A

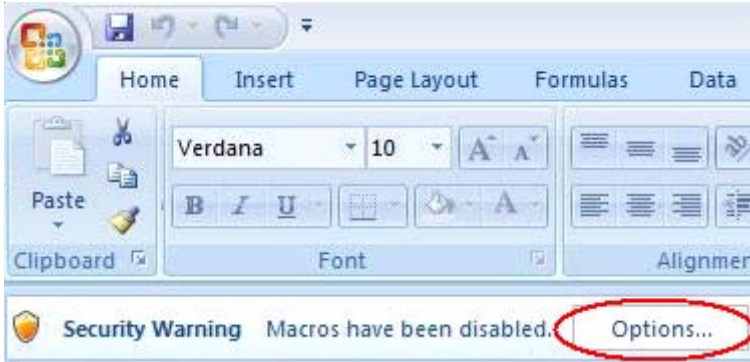
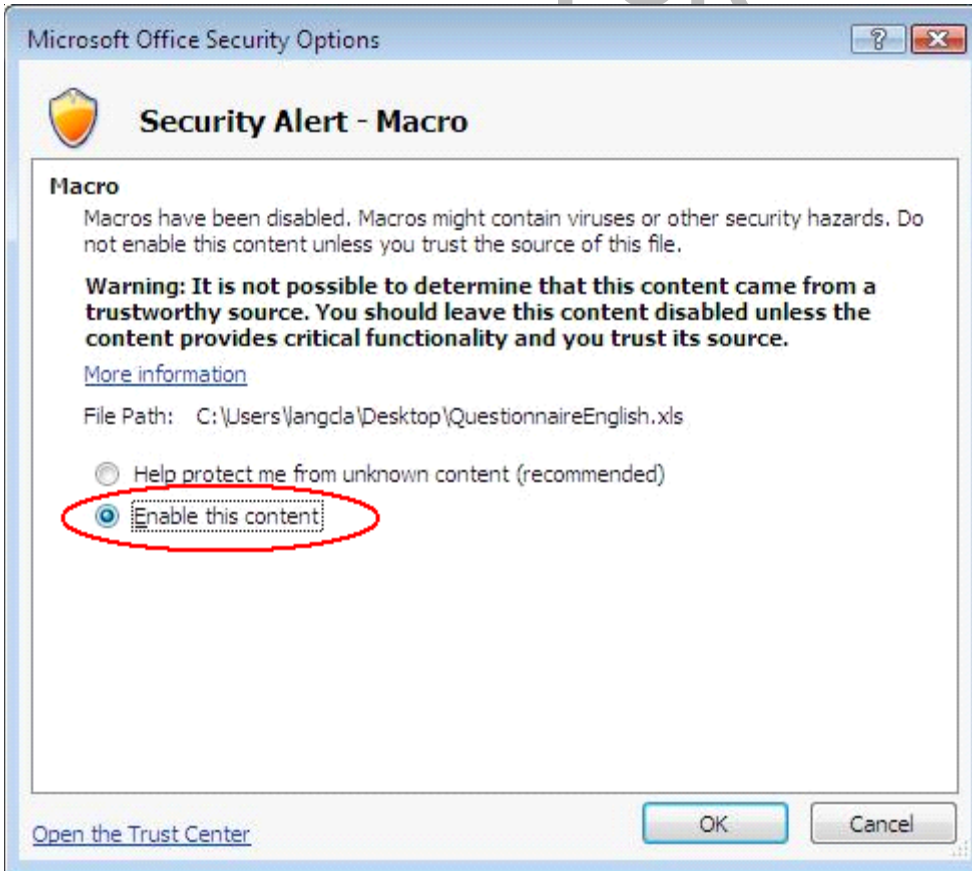


Figure 7B

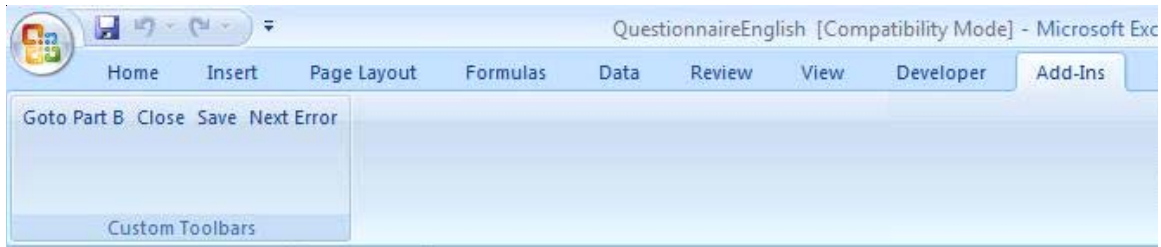


Finding additional buttons when accessing Part A and Part B of the questionnaire

To manoeuvre more easily once in either Part A or Part B of the questionnaire, use the **Add-Ins** ribbon, see Figure 7C.

Figure 7C

(Part A)



(Part B)



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