

Creating Tables from Multiple Data Sources Using WebCASPAR

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Welcome to the WebCASPAR Webinar on how to create a WebCASPAR table using multiple data sources.

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This Webinar is designed to provide WebCASPAR users with a concise overview of the application's features and functionality by way of a brief demonstration.

The Webinar is not designed as a follow-along session, but instead as guided tutorial where users are introduced to the process of table building.

This recording will cover the following six topics:

1. General Information about using WebCASPAR
2. Building a Table
3. Adding and Modifying Variables
4. Formatting the Table
5. Viewing the Table
6. Exporting the Table

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Now let's review the built-in help features of the WebCASPAR table builder.

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There is a robust help feature built into WebCASPAR.

Clicking the word "Help" located throughout the application provides users with detailed information about a particular data source including, source surveys, contact persons for each specific survey, as well as information about which years of data are currently available for each survey.

Also, please note that there are question marks strategically located throughout the Table builder that will also provide access to the built-in help features.

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To create a table we first must select our data sources.

For our example today we will select two data sources - the NSF Survey of Earned Doctorates/Doctorate Records File, and the NSF-NIH Survey of Graduate Students & Postdoctorates in Science and Engineering.

Click on **Select Data Source to advance.**

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Now we will add an analysis variable to our table by highlighting “Number of Doctorate Recipients by Doctorate Institution” in the variable pull-down list under the NSF Survey of Earned Doctorates.

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To add a second variable hold down the “Control” key on a PC or the “Command” key on a Macintosh and choose “Number of Graduate Students by Race/Ethnicity” from the variable list under the NSF-NIH Survey of Graduate Students and Postdoctorates in S&E heading.

Click on **Select.**

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The screen will refresh and display the Number of Doctorate Recipients by Doctorate Institution and Number of Graduate Students by Race/Ethnicity in bold above the Add Analysis Variable(s) pull down list, indicating that they have been selected for inclusion in the table.

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Variables will appear in the table in the order in which they are selected.

By default, WebCASPAR selects Year as a required classification variable.

Click on either the Modify Classification Variables tab at the top of the screen or the button at the bottom of the screen.

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The text in the Selected Values row displays current values associated with the selected variable.

The default value for Year is “Most recent year.” Please note that not all of the surveys have data posted for the same years.

In order to verify which years of data are available for each survey, users can click the question mark icons in the Table Summary section.

For this example we will be using the 2005 data.

Click on the Edit button just to the left of “Most recent year” to manually select 2005.

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First click on the “Remove All” button.

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Next, select 2005 from the Available Values list and click on “Add Values”

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Finally, note your choice under “Selected Values.”

Select “Save” to retain the change and return to your table.

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2005 is now the new value for the data year variable.

We will now select additional classification variables for the table. Choose Race & Ethnicity (standardized) from the pull-down list and click on **Select**.

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The screen will refresh and display Race & Ethnicity (standardized) in bold above the Add Classification Variable(s) pull down list.

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Select “Gender” from the Add Classification Variable(s) pull-down list.

Click on **Select**.

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The screen will refresh and display “Gender” as a selected classification variable. Choose the “Selected Values in Column” option for Gender.

Now choose “Academic Discipline, Detailed (standardized)” from the Add Classification Variable(s) pull-down list.

Click on **Select**.

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For the Academic Discipline Variable change the Display selection from Selected Values in Row (the default value) to Do Not Display Selected Values.

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Finally, choose Academic Institution (standardized) from the Add Classification Variable(s) pull-down list.

Click on **Select**.

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Each classification variable has a default set of values associated with it. You can add or remove values to create a custom specification using the Edit Classification Variable function. For this exercise, we will change the value for Academic Discipline, Detailed (standardized) from the default setting “All values” to “Science and Engineering (includes medical and other life sciences).”

On the Modify Classification Variables screen, click on the **Edit** button next to Selected Values under the “Academic Discipline, Detailed (standardized)” variable to access the Edit Classification Variable screen.

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The Available Values field on the left side of the Edit Classification Variable screen contains a list of the available values that you can add to the Academic Discipline, Detailed (standardized) variable.

The Selected Values field on the right side of the screen displays the currently selected values for this variable.

Select the system-defined group “Science and Engineering (includes medical and other life sciences)” in the Available Values field.

Click on **Add Value(s)**.

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Click on **Save** to retain the new value selected for this variable.

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The selected value for this variable has changed and now displays Science and Engineering (includes medical and other life sciences) as the current value for the variable.

For this exercise we will use the Institution Search feature to locate several individual institutions to replace the default value for Academic Institution (standardized), which is “All values.”

On the Modify Classification Variables screen, click on the **Edit** button next to Selected Values under the Academic Institution (standardized) variable to access the Edit Classification Variable screen.

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Click on **Institution Search** on the left side of the screen under the Available Values field to access the Define Institution Search Criteria screen.

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The Define Institution Search Criteria screen provides a number of options for searching the WebCASPAR institution database for values. For this exercise, you will be searching for public institutions in the District of Columbia, Maryland, and Virginia.

In the State field, choose the District of Columbia, Maryland, and Virginia by holding down the “Control” key on a PC or the “Command” key on a Macintosh and making your selection.

In the Control of Institution row, mark the Public Institutions checkbox.

Click on **Search**.

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The Search Results screen displays the institutions identified in your search on the left side of the screen.

You must select the institutions to include in your WebCASPAR table and move them to the “Institutions You Have Selected” field on the right side of the screen. For this exercise, you will select all of the resulting institutions.

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Select all of the institutions on the left side of the screen and click on “Add Values.”

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The institutions you have selected will now be available for this variable.

Click on **Done** to return to the Edit Classification Variable screen.

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On the Edit Classification Variable screen, click on **Save** to retain the selections and return to the Modify Classification Variables screen.

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The institutions that you selected will be displayed next to Selected Values under Academic Institution (standardized).

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The Format Output Table screen allows you to change the visual arrangement of elements within the table. You can change the order, row, column, and heading positions of analysis and classification variables; change the output format of the table; and change the number of rows and columns that appear in the table in browser view.

Click on either the Format Table tab or button at the top or bottom of the screen to access the Format Output Table screen.

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The classification variables for this example appear in the rows and columns indicating the order in which they will appear in the table.

To make changes to the placement of the variables you should use the controls highlighted in the box. You can also change the output format of the table by using the options at the bottom of the screen.

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Click on the down-arrow to the right of the Race and Ethnicity variable to reposition that variable within the table.

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As you can see we have changed the position of the row variables, and have thus completed the necessary selections to generate a WebCASPAR table. As a reminder, the minimum selection requirements for a complete table are one data source, one analysis variable, and one classification variable.

The Format Table page is optional. You can click on View Table directly from the Modify Analysis Variables page or Modify Classification Variables page if you don't want to change the format of your table.

Click on either the View Table tab at the top of the Format Output Table screen or the **View Table** button at the bottom of the screen to generate the WebCASPAR table.

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The formatted WebCASPAR table will be displayed in your browser.

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Because this table is so large we will demonstrate how to export the table.

WebCASPAR allows you to export the table into several file formats. For the purposes of this exercise we will export the table as a Microsoft (MS) Excel file.

Select Microsoft Excel (tab-delimited) in the Output Destination section in the center of the screen.

Click on **Export**.

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WebCASPAR allows you to export the table into several file formats. For the purposes of this exercise we will export the table as a Microsoft (MS) Excel file.

Select Microsoft Excel (tab-delimited) in the Output Destination section in the center of the screen.

Click on **Export**.

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Excel will open, displaying the table.

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WebCASPAR allows you to e-mail colleagues a link to your table using the E-Mail Table Link function.

To send the link complete the form and click on **Send**.

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You will be notified once the message has been sent.

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The email message will contain a link to the table as well as summary information on the content and format of the table.

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If you are a registered user, WebCASPAR allows you to save the data source and variables you selected on the Table Builder screen.

Saving your selections allows you to easily retrieve the table at a later date rather than re-creating it.

Log into the WebCASPAR system, if you have not already done so.

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Click on **Save Table**.

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Enter a brief descriptive title in the “Name of the Table” field.

Click on **Save**.

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WebCASPAR will save the table specification and return you to the Table Viewer screen.

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This concludes our tutorial on how to create tables from multiple data sources in WebCASPAR.

For more information about WebCASPAR please contact the Division of Science Resources Statistics at the National Science Foundation.

Thank you.

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