

# Tutorial

## Getting Started

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### Overview

Marketing Engineering for Excel (ME<sup>XL</sup>) is an add-in for Microsoft's Excel spreadsheet software. ME<sup>XL</sup> appears as a drop-down menu (labeled ME►XL) in the Excel toolbar.

ME<sup>XL</sup> is the result of years of research in the practice of applying analytics to marketing. Within the ME►XL menu, you will find a variety of analytic tools that to bring fact-based analysis to bear on marketing decisions.

The software includes a tutorial for each model, for those who want an overview of the capabilities within each model, as well as context-sensitive Help files integrated within each model.

Furthermore, ME<sup>XL</sup> offers an independent analysis tool that serves as a teaching aid when used in conjunction with any of our textbooks. These textbooks are available through our Web site, [www.marketingengineering.com](http://www.marketingengineering.com).

### System Requirements

ME<sup>XL</sup> has been developed for Microsoft's Windows Operating System. Because it is an Excel add-in, you will need to have installed Microsoft's Excel product to use it.

DecisionPro supports ME<sup>XL</sup> in the following environments:

- Windows XP or Vista operating systems.
- Microsoft Office/Excel versions 2002(XP), 2003 or 2007.

### Software Installation

The ME<sup>XL</sup> software is installed through a self-extracting file downloaded from [www.marketingengineering.com](http://www.marketingengineering.com). (Be sure to uninstall any previous versions ME<sup>XL</sup> before installing a new version; see the section on software removal to do so.)

After downloading the file, simply click on the file that was downloaded. The installation process will begin automatically. Most users will be able to follow the on-screen dialog boxes. These steps are detailed on the following pages.



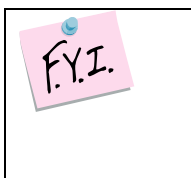
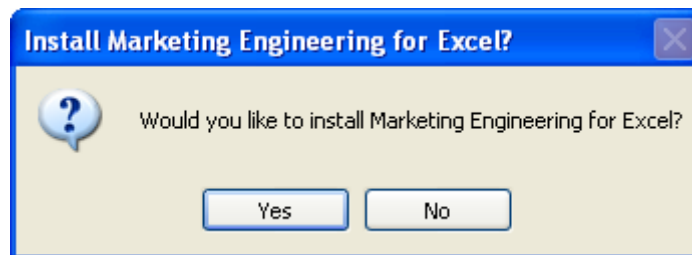
Should you encounter any difficulty during installation of Marketing Engineering for Excel, please visit [www.marketingengineering.com](http://www.marketingengineering.com) and review the FAQs located there.

If you are unable to resolve an installation problem, please email us at [support@marketingengineering.com](mailto:support@marketingengineering.com).

Depending on the settings of your particular system, you may get a security warning, as shown in the following dialog box. If such a warning appears, simply click Run.

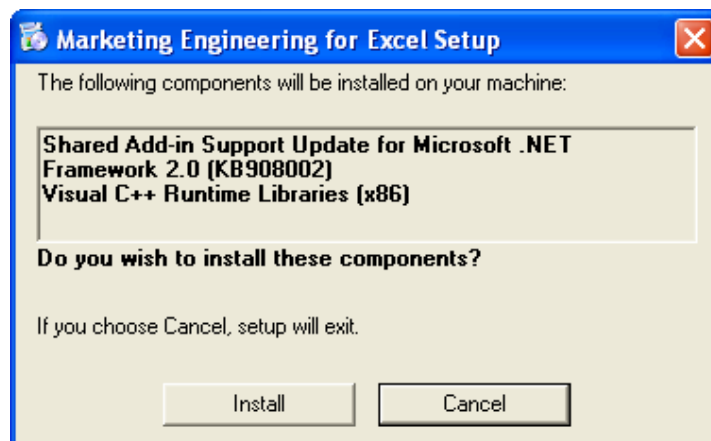


You will be prompted to confirm the installation of ME<sup>XL</sup>, click Yes.

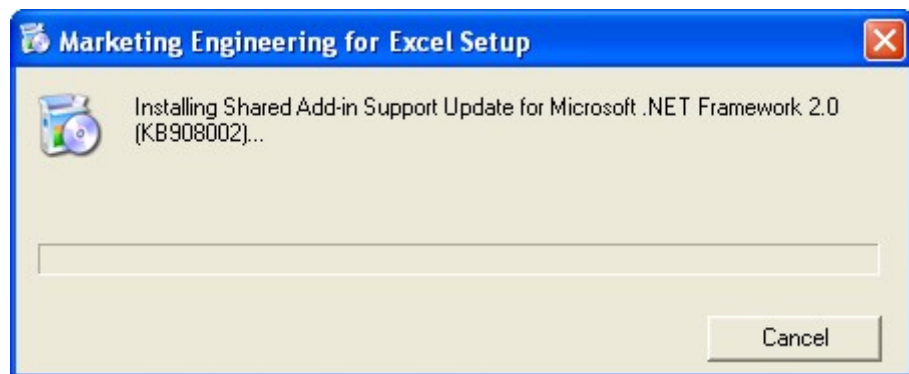
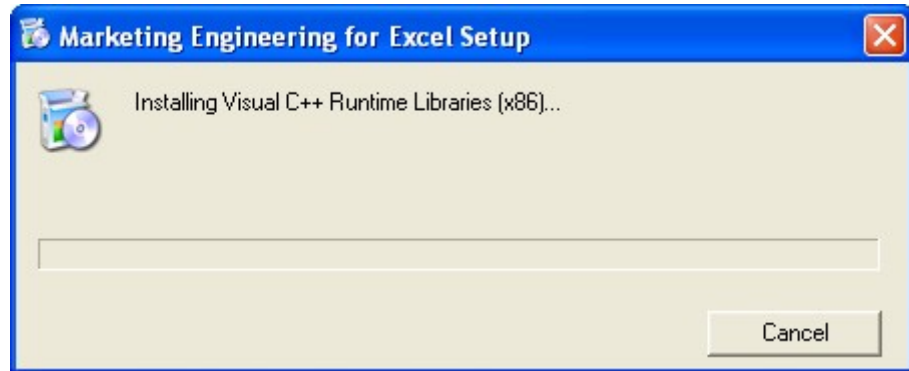


If you do not have Microsoft's .Net Framework 2.0 installed **before** installing ME<sup>XL</sup>, the ME<sup>XL</sup> installation will abort and direct you to install the Framework before continuing. If you require assistance in obtaining the .Net software, please visit the ME<sup>XL</sup> FAQ page on [www.mktgeng.com](http://www.mktgeng.com).

Depending on the configuration of your computer and what other software you have already installed, you may be presented with a few dialog boxes asking you to confirm the installation of some Microsoft component software on your computer. ME<sup>XL</sup> is built using the latest Microsoft .Net Framework, please confirm the installation of these components as shown below.



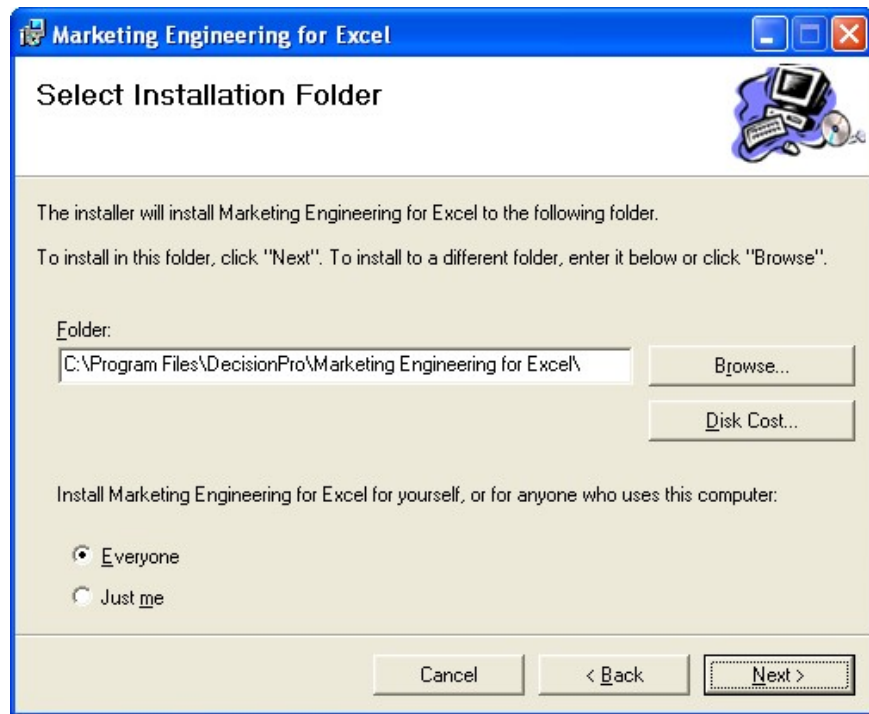
You will see one or two “progress boxes” showing you the status of these component installations. Should any error messages occur, please contact us at [support@marketingengineering.com](mailto:support@marketingengineering.com)



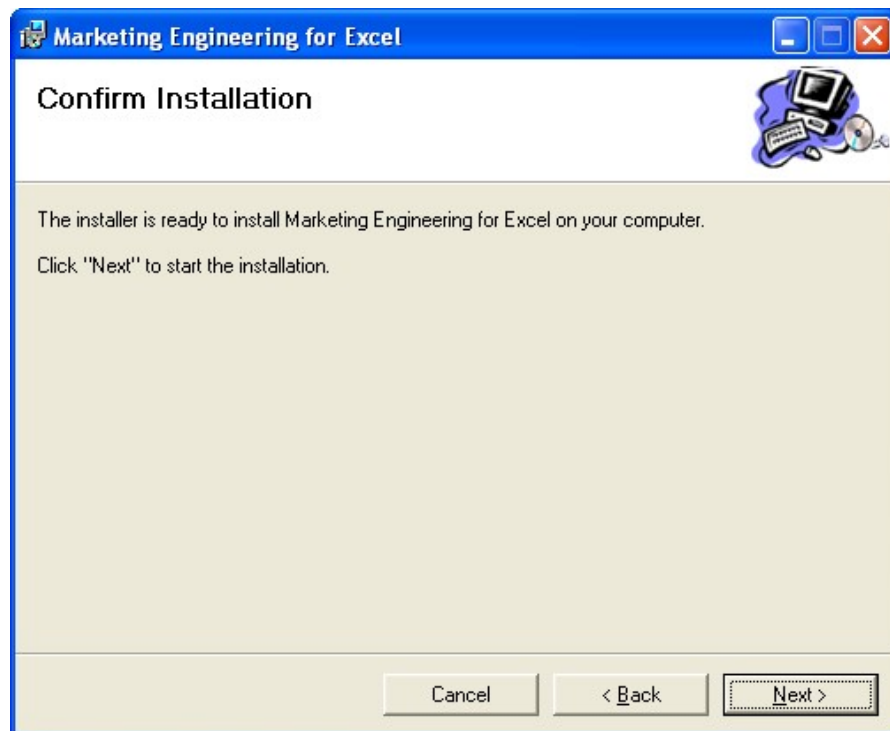
When the initial ME<sup>XL</sup> installation dialog box appears, click Next.



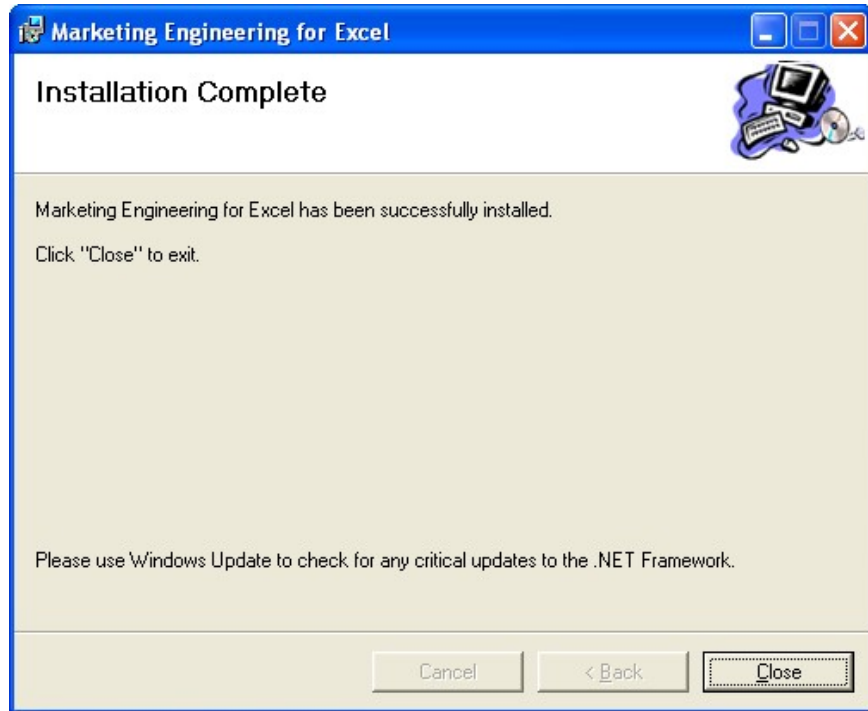
You will be prompted to choose the folder in which you want to install the software. Change the default folder location if desired. Click Next when ready.



A dialog box will appear and ask you to confirm the software installation. Click Next to install, or click Cancel to stop the installation.



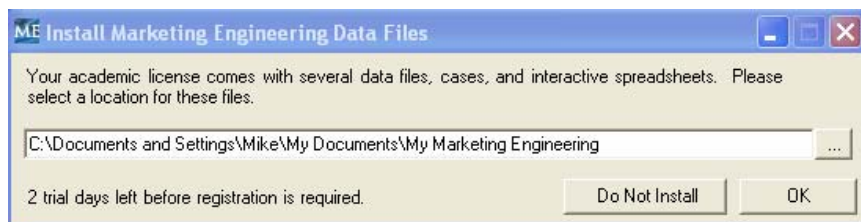
When the ME<sup>XL</sup> software installation is complete, the following dialog box appears. Click Close to close the dialog box.



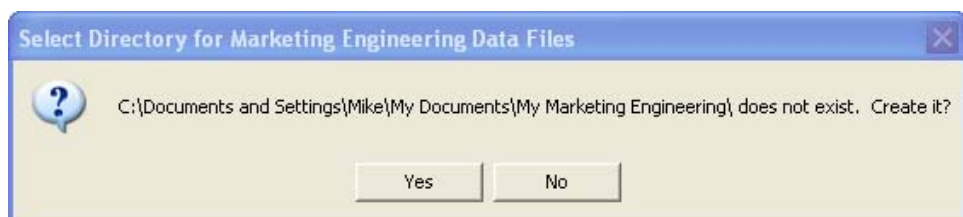
ME<sup>XL</sup> is distributed with several optional data files that provide additional analytic spreadsheets you will find useful. The default installation directory for these optional files is My Marketing Engineering within My Documents.

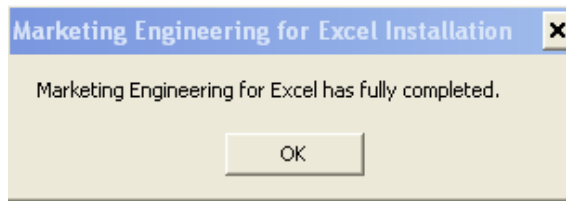


To accept this location, simply click OK. To chose a different directory, overwrite the file name displayed. To omit the installation of these files, click Do Not Install.



If you have not previously installed ME<sup>XL</sup>, you will be prompted to create the My Marketing Engineering directory.



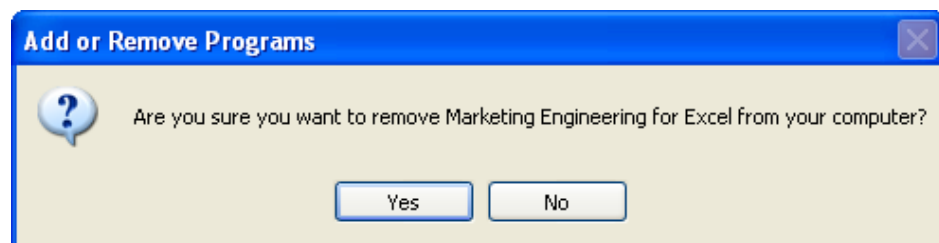


When ME<sup>XL</sup> installation is fully complete, you may begin using ME<sup>XL</sup>. Start Excel and click on the ME►XL drop-down menu in the toolbar.

## Software Removal

Should you need to remove ME<sup>XL</sup>, you may do so from the Windows Control Panel, using the Add/Remove Programs function. Note that before installing a newer version of ME<sup>XL</sup>, you will need to remove the previous version using this process.

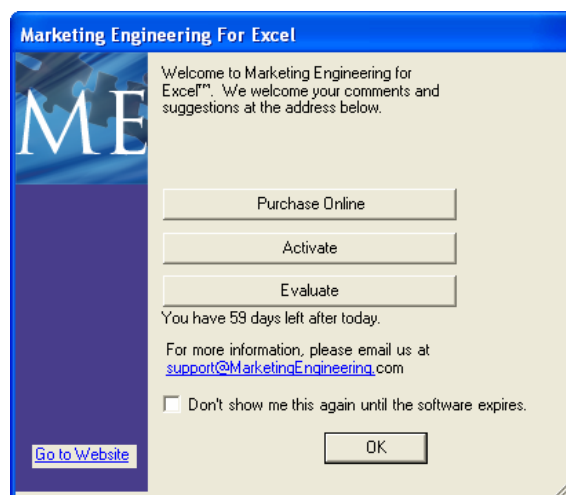
From the Windows Control Panel → Add/Remove function, choose Marketing Engineering for Excel. You must confirm the removal of the software; click Yes or No as appropriate.



To preserve any files you may have created within the My Marketing Engineering directory, this directory is **not** removed during the uninstall process. If you no longer require this directory or files, you may remove them manually.

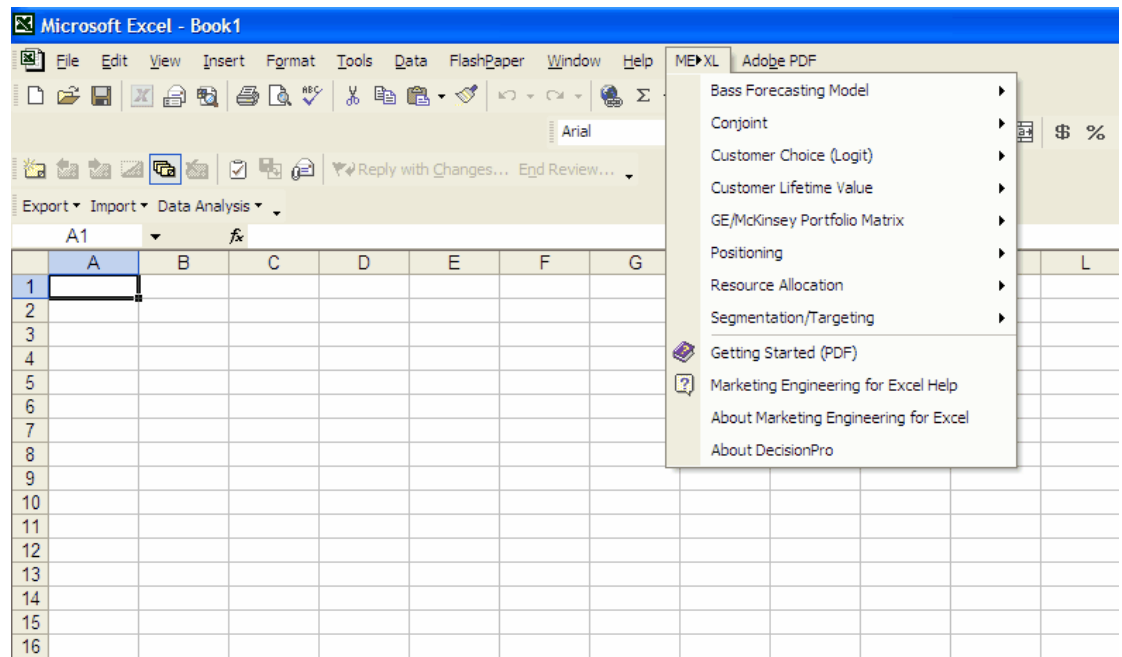
## Starting ME<sup>XL</sup>

ME<sup>XL</sup> will load as an Excel add-in each time you start Excel. When you start Excel, you will see the following dialog box that indicates your license status:



There are several license options available for ME<sup>XL</sup>, so the above example may not match your situation. Upon initial installation, you should click on either Purchase Online (to purchase the software) or Activate (if you have been provided an Activation Code).

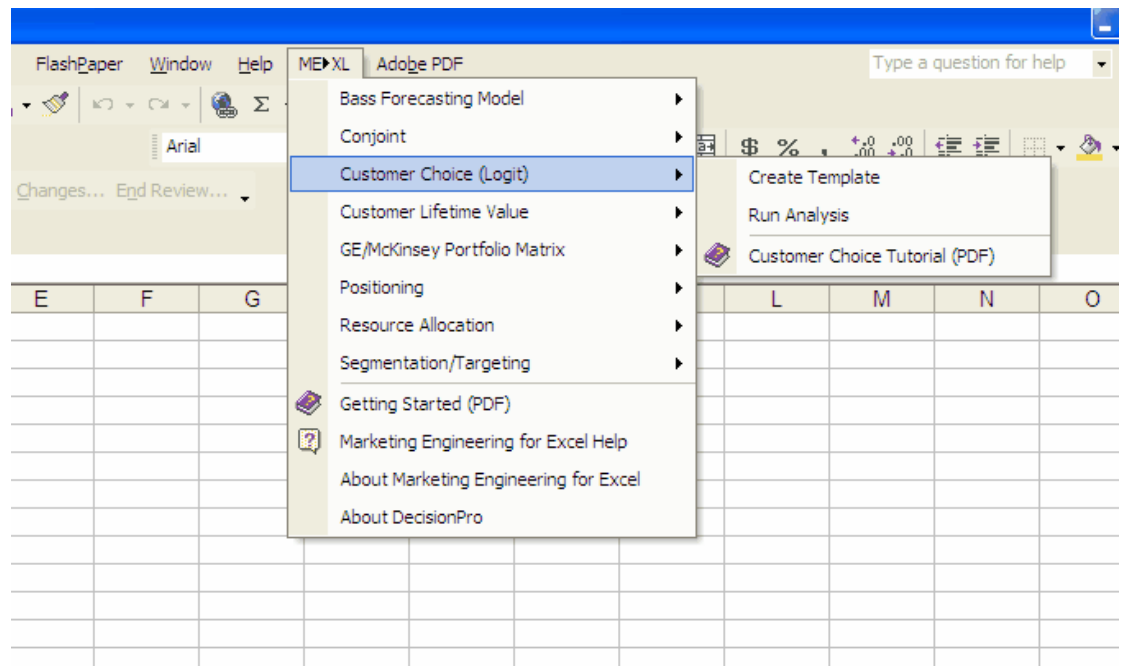
After you open Excel, the ME<sup>XL</sup> menu appears in the Excel toolbar. When you click on the ME<sup>XL</sup> menu, the following menu appears:



In the sections that follow, you will find descriptions of the elements within the individual software models.

## Tutorials

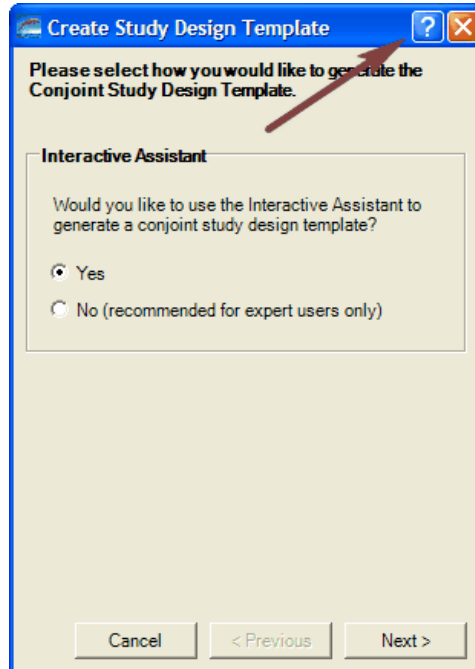
ME<sup>XL</sup> is distributed with tutorials for each individual model. These tutorials can be found in the submenu for each model, as illustrated below.




Users new to Marketing Engineering will find the tutorials provide valuable explanations of the models, data requirements, how data are used, and how to interpret the model output.

## Help Files

Within each ME<sup>XL</sup> model, you will find context-sensitive Help files. To use the integrated Help capability, click on the icon shown in the top-right corner of each ME<sup>XL</sup> dialog box.



After clicking , move your mouse to the area of the dialog box with which you would like help, and click it. A Help dialog box will open for the specific area and also show the complete Help index.

The complete Help index also is available as a selection from the ME►XL menu.

## Using ME<sup>XL</sup> with Excel

The ME<sup>XL</sup> software is an Excel add-in which allows you to use the full range of Excel capabilities along with your ME<sup>XL</sup> tools. While a full description of Excel capabilities is beyond the scope of this guide, here are a few suggestions to enhance your use of ME<sup>XL</sup>.

- All ME<sup>XL</sup> output is delivered in an Excel workbook, using standard Excel objects such as cells, charts and graphs. Right-clicking on a label, chart or line will allow you to format that item as you would in any Excel workbook. This is useful when incorporating ME<sup>XL</sup> output in a presentation.
- ME<sup>XL</sup> outputs all the data in a given study, some of which might be superfluous in your final analysis. You can select and delete any output that does add value to the analysis to reduce the “chart clutter”.
- Using the right mouse button you can easily change the color or weight of lines to draw attention to items that are critical in your analysis.



The Help menu item in the Excel toolbar will offer you additional resources to allow you to customize your ME<sup>XL</sup> output.

## Additional Resources

The ME<sup>XL</sup> software implements tools and techniques explained in two books published by Trafford Press and made available through DecisionPro.



### **Principles of Marketing Engineering**

(2007, Gary L. Lilien, Arvind Rangaswamy, Arnaud De Bryun) Trafford Press: Vancouver BC.

230 pages

This book provides a non-technical overview of the principles, benefits, and applications of Marketing Engineering for practitioners who need to apply the tools today and students who will use them tomorrow.



### **Marketing Engineering, Revised Second Edition**

(2004, Gary L. Lilien, Arvind Rangaswamy) Trafford Press: Vancouver BC.

518 pages

A more technical and complete version of the *Principles* book, aimed at the reader who wants to know the inner workings of Marketing Engineering.

These books may be purchased through our Web site, [www.marketingengineering.com](http://www.marketingengineering.com).

Also on our Web site, registered users will find Technical Appendices that further explain the analytics used by each model.