Tutorial
Getting Started

Overview

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

ME^{XL} is the result of years of research on the theory and practice of applying analytics to marketing. Within the ME►XL menu, you will find a variety of analytic tools that 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. There are also context-sensitive Help files integrated within each model.

ME^{XL} provides a set of analysis tools that can be used as teaching aids in conjunction with any of our textbooks. These textbooks may be purchased directly at our website, www.decisionpro.biz.

System Requirements

ME^{XL} 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 (Windows version) product to download and install Marketing Engineering for Excel on your computer.

DecisionPro supports ME^{XL} in the following environments:

- Windows XP, Vista, Windows 7, or Windows 8 operating systems.
- Microsoft Office/Excel versions 2002(XP), 2003, 2007 or 2010, 2013

Software Download

There are two download options for the Marketing Engineering for Excel add-in. One version is compatible with the 32-bit version of Excel and the other is compatible with the 64-bit version of Excel. **Installing the incorrect version will result in the add-in not appearing in Excel.** To determine which version of Excel you have:

- Prior to Office 2010, all Excel versions were 32-bit.
- Office 2010 and 2013 may be either 32-bit or 64-bit. To determine if you have the 32-bit or 64-bit version of Office, open Excel and go to File -> Account in Office 2013 or File -> Help in Office 2010. Under the About Microsoft Excel heading will be your Excel version number followed by either 32-bit or 64-bit.

Software Installation

The file downloaded from www.decisionpro.biz is a compressed zip file containing the software installation file and the Getting Started Guide. Expand the zip file before running the installation file (right click on the zip file and select "Extract All..."). After expanding, double click the installation file (e.g., MEXL_V2-0_EDU_130530.msi). (Be sure to uninstall any

previous versions of ME^{XL} before installing a new version; see the section on software removal to do so.)
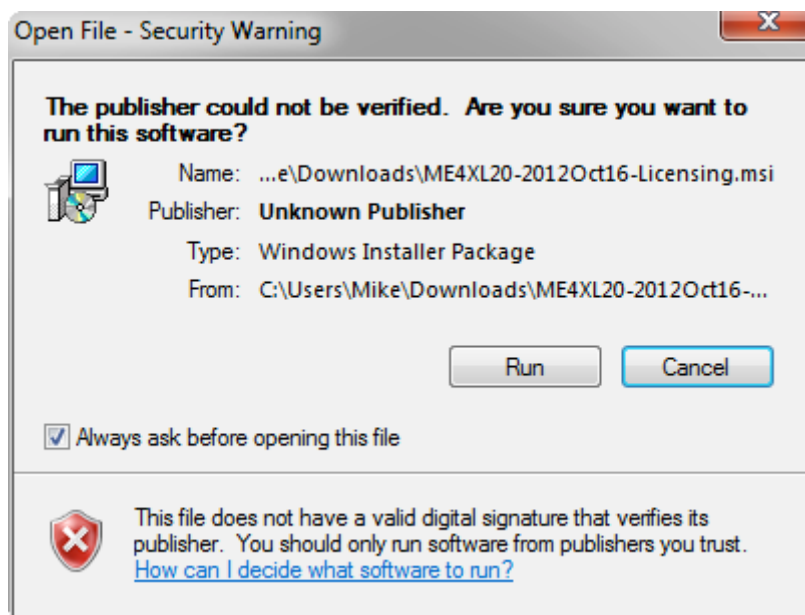
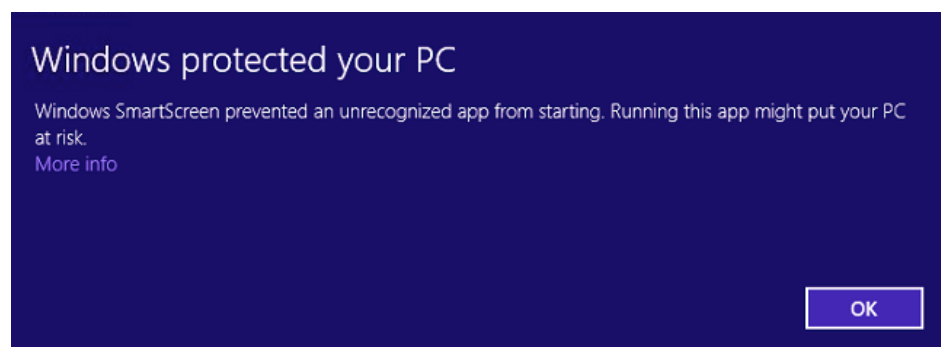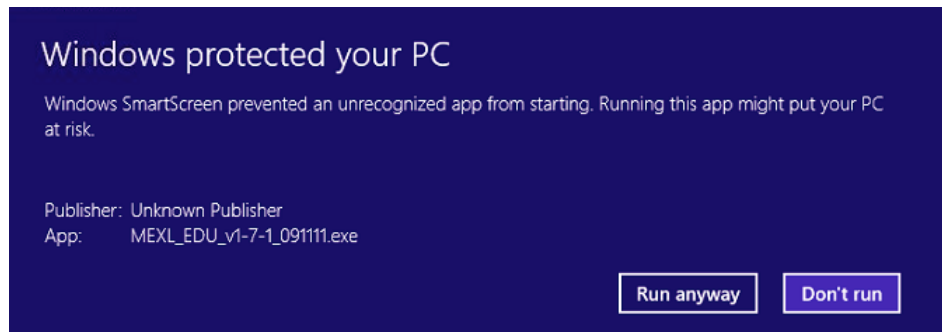|	This guide has been developed for installation using Windows XP and Office 2003. Users installing with Windows Vista or Windows 7 or other versions of Office may see subtle differences in the installation prompts, but the overall flow will remain the same.
F.Y.I.	Should you encounter any difficulty during installation of Marketing Engineering for Excel, please visit www.decisionpro.biz and review the FAQs located there.
	If you are unable to resolve an installation problem, please email us at support@decisionpro.biz.

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, click on the Run button.

If installing with **Windows 8**, you may get the security warning shown below. If you click "OK" the installation will terminate. You must click "More info".
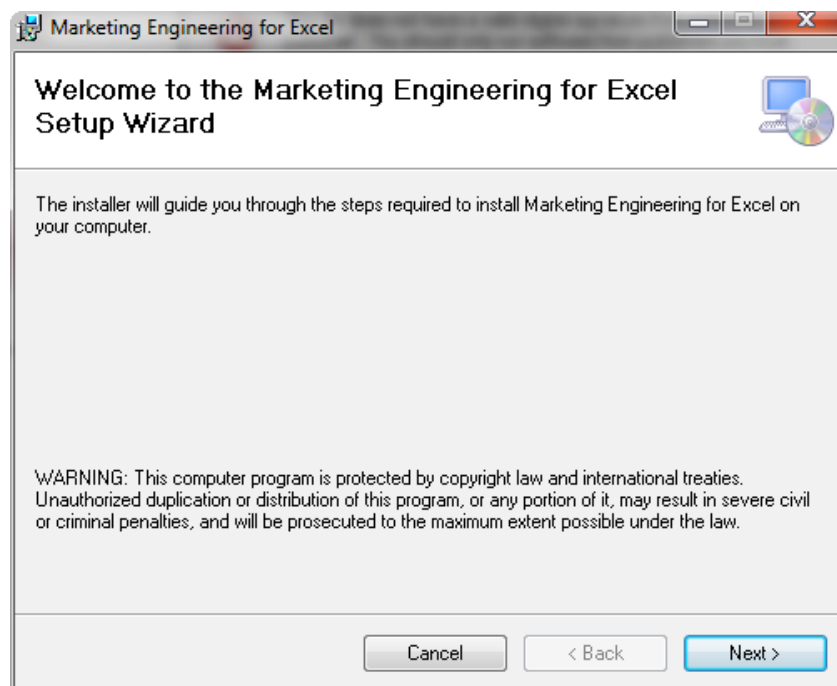

Clicking "More info" will show the screen below, where you should click "Run anyway"
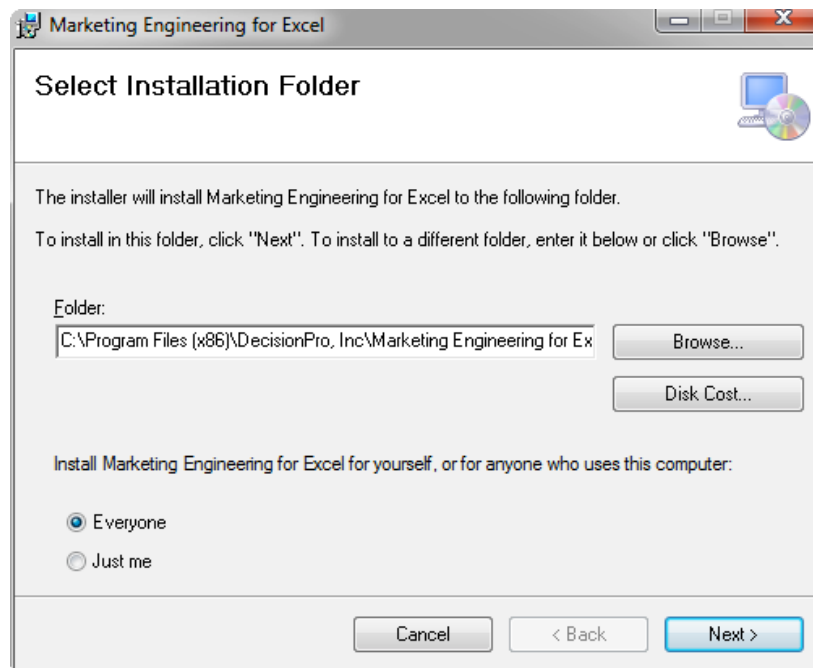
Windows protected your PC

Windows SmartScreen prevented an unrecognized app from starting. Running this app might put your PC at risk.

Publisher: Unknown Publisher
App: MEXL_EDU_v1-7-1_091111.exe

Run anyway   Don't run

Note: If you have User Account Control (UAC) enabled, you may also get a prompt from UAC asking for permission to continue the installation.

F.Y.I.	If you do not have Microsoft's .Net Framework 4.0 installed **before** installing ME^{XL}, the ME^{XL} installation will terminate and direct you to install the .Net Framework before continuing. If you require assistance in obtaining the .Net software, please visit the ME^{XL} FAQ page on www.decisionpro.biz.

When the initial ME^{XL} installation dialog box appears, click Next.

Welcome to the Marketing Engineering for Excel Setup Wizard

The installer will guide you through the steps required to install Marketing Engineering for Excel on your computer.

WARNING: This computer program is protected by copyright law and international treaties. Unauthorized duplication or distribution of this program, or any portion of it, may result in severe civil or criminal penalties, and will be prosecuted to the maximum extent possible under the law.
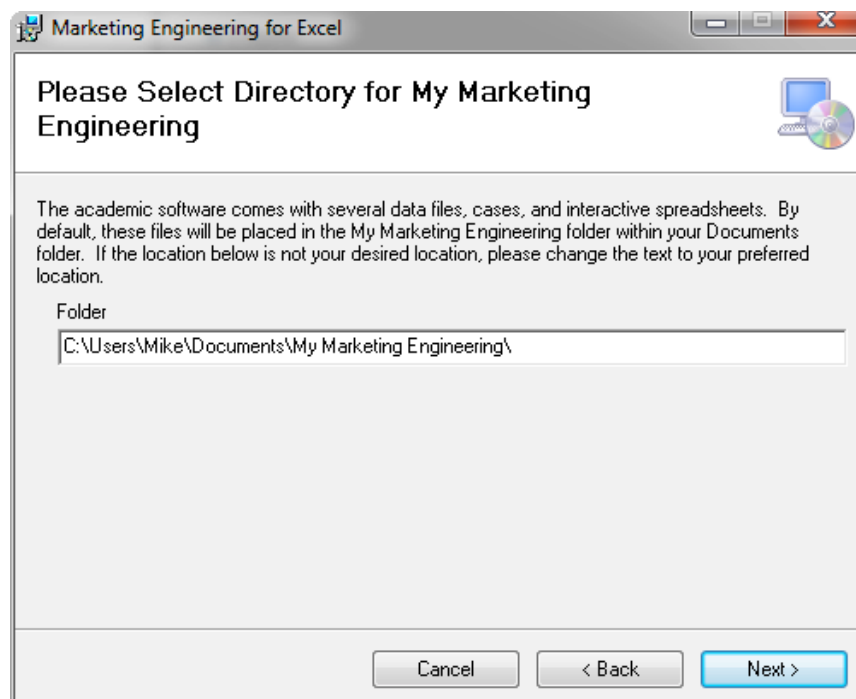
Cancel   < Back   Next >

You will be prompted to choose the folder in which you want to install the software. Change the default folder location if desired. It is best to install ME^{XL} on a local drive rather than a network drive. Click Next when ready.
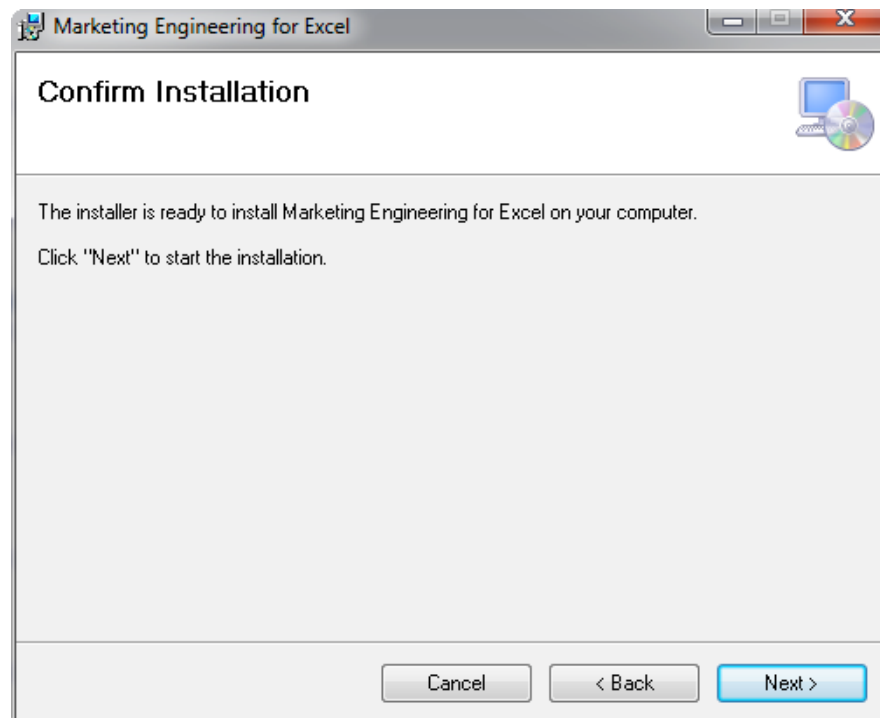
ME^{XL} is distributed with several optional data files that provide additional analytic spreadsheets you may find useful. The default installation directory for these optional files is My Marketing Engineering under My Documents.
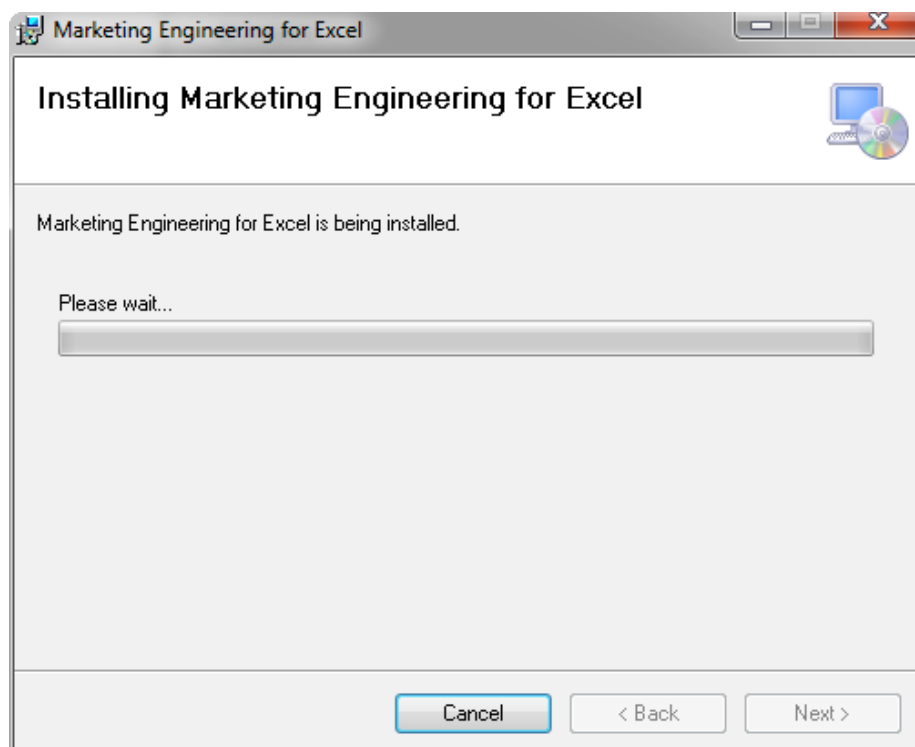
To accept this location, click Next. To choose a different directory, overtype the file name displayed.
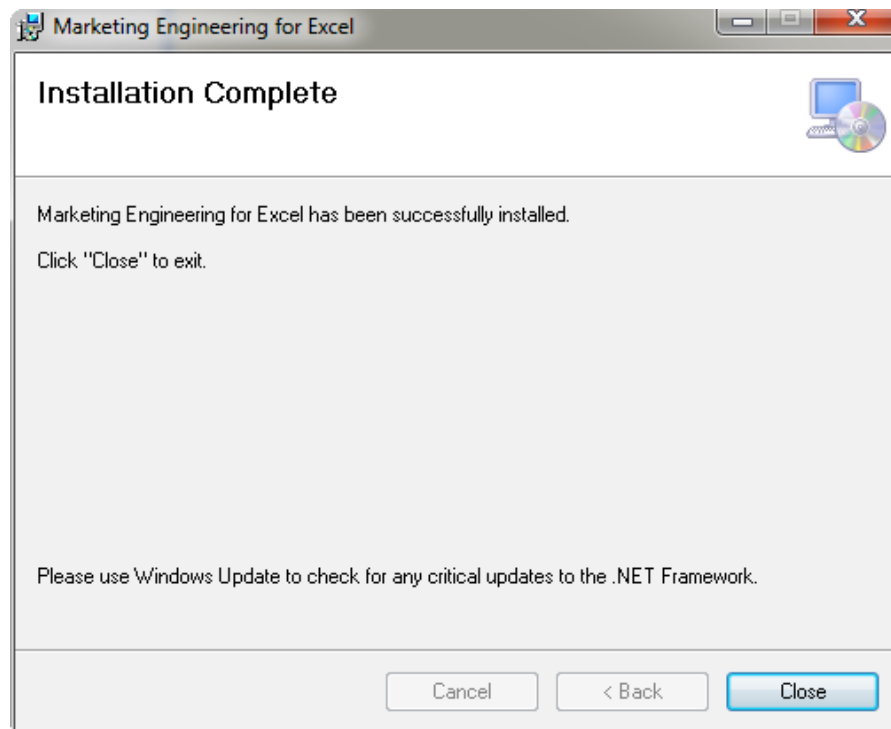

A dialog box will appear and ask you to confirm the software installation. Click Next to install, or click Cancel to stop the installation.

The dialog box below will appear with a bar showing installation progress. If you have User Account Control enabled, you may also get a pop-up from Windows asking you to allow the installtion.

When the ME^{XL} software installation is complete, the following dialog box appears. Click Close to close the dialog box.

When ME^XL installation is fully complete, you may begin using ME^XL. Start Excel and click on the ME►XL drop-down menu in the Excel toolbar (under Add Ins tab in Excel 2007 and later).

Software Removal

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

From the Windows Control Panel → Add/Remove function, choose Marketing Engineering for Excel. If you have User Account Control enabled, you must confirm the removal of the software; click Yes or No as appropriate.
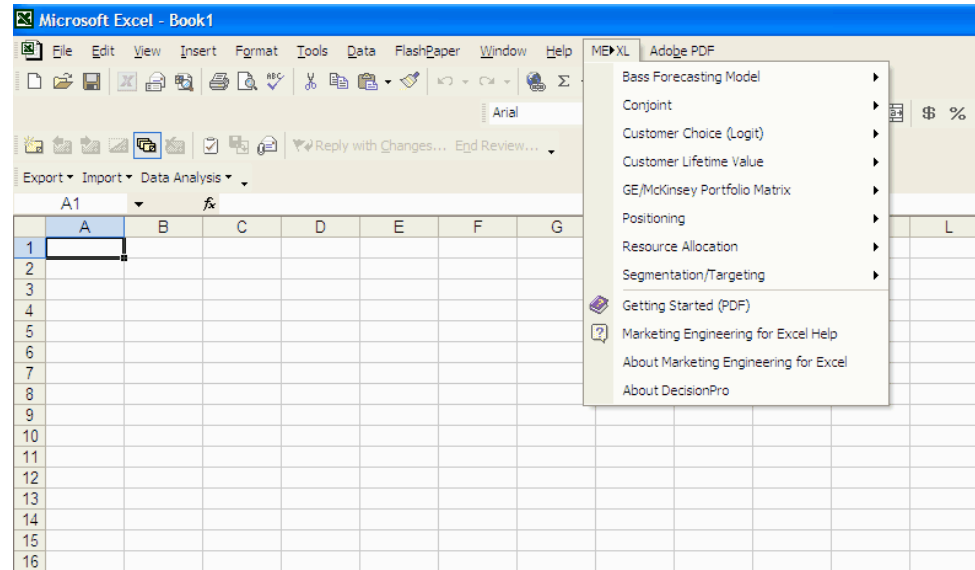
F.Y.I.	To preserve any files you may have created within the My Marketing Engineering directory, this directory is **not** removed during the uninstall process. If you no longer require this directory or files, you may remove them manually.

Starting ME^{XL}

ME^{XL} will load as an Excel add-in each time you start Excel and a new menu item (ME▶XL) will be created. The location of the menu item will depend on your version of Excel.
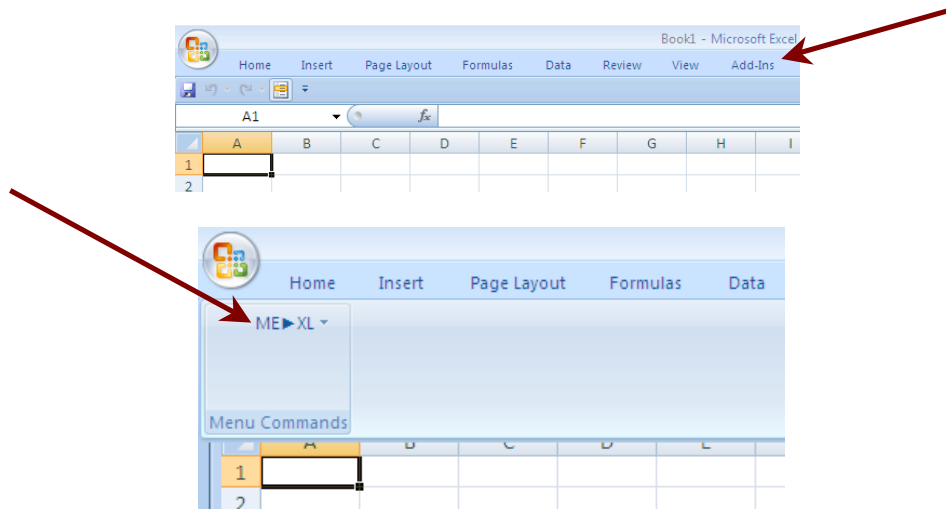
ME^{XL} using Excel XP or 2003

After you open Excel, the ME▶XL menu appears in the Excel toolbar. When you click on the ME▶XL menu, the following menu appears:
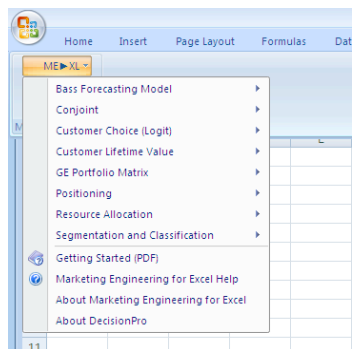

In the sections that follow, you will find descriptions of the elements within the individual software models.

ME^{XL} using Excel 2007, Excel 2010, or Excel 2013

With recent versions of Excel, the ME►XL menu is accessed from the Add-Ins tab, as shown in the sequence below.

When you click on the drop down arrow next to the ME►XL menu, the following menu appears:

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

Activating ME^{XL}

Most copies of ME^{XL} will be fully functional for a brief trial period before requiring activation. You can see how many days remain on your license by clicking the About Marketing Engineering for Excel item in the ME^{XL} toolbar item. If the software is not activated within the trial period, it will revert to a demo mode and the ME^{XL} analysis option will be disabled.

There are several license options available for ME^{XL}, so the above example may not match your situation. When you are ready to activate ME^{XL} click on either Buy Now (to purchase the software) or Activate Online (if you have been provided a Software License ID and Password).
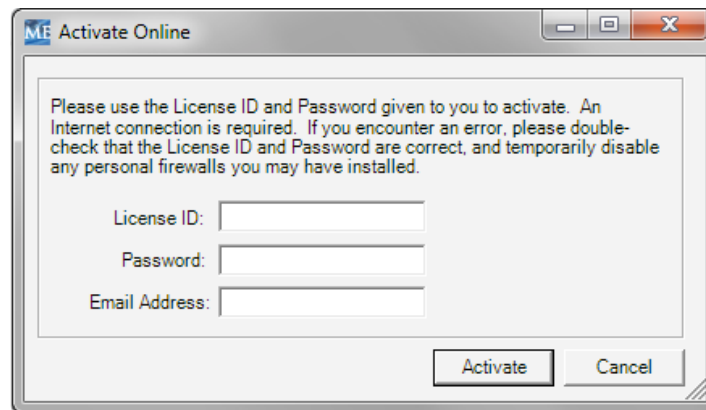
Purchasing a Software License

Clicking the Buy Now button will open a web browser to the software license purchase website. Follow the onscreen instructions to purchase the appropriate software license. Note that during the purchase process you will need to create a new account on the software license website unless you have previously purchased Marketing Engineering for Excel software. At the end of the purchase process you will receive a software License ID and Password (you will also receive the information via email).

Activating Your Software (requires an internet connection)

There are two methods to activate your software:

1. **Activate Online**
   The first (and preferred) method is to use the Activate Online option. The Activate Online option will automatically connect to our license server to activate the software using your License ID and Password. To start the process, click the Activate Online button and a new window will open where you enter your License ID, Password, and Email Address:

After entering your information, click Activate. You will receive an "Action Complete" message if the activation is successful. The About Marketing Engineering for Excel window should now show that your license status is Active.

If the activation fails or you find your software is not active even after receiving an "Action Complete" message, it is usually an indication that a firewall or other computer/network security is preventing our activation server from communicating with your computer to complete the activation. In this case, proceed to the Activate Manually option below.

2. **Activate Manually**
The second method (if the online activation does not work) is the Activate Manually option. The manual activation process requires copying and pasting data between the software and our license server to complete the activation. Clicking the Activate Manually button will bring up the following window:

Enter your License ID and Password and click Generate Request. The Activation Request data section will fill with the necessary information identifying your software and computer:

Click the Copy button and then the Open Activation Web Page button. A new webpage will open in your browser. Follow the online instructions to paste the Activation Request data into the website:

Manual Request

This page may be used for processing manual requests, including appropriate method of posting the request to retrieve a response.

Copy and Paste Request

Please copy the request from the application, right-click in the text box below and click paste, then click the submit button below.

```
<ActivateInstallationLicenseFile>
<EncryptionKeyID>31f7b7cf-3bb9-4fe6-8a5a-
b8b3df99bf5c</EncryptionKeyID>
<EncryptedData Id="PrivateData"
Type="http://www.w3.org/2001/04/xmlenc#Elem
ent"
xmlns="http://www.w3.org/2001/04/xmlenc#">
<CipherData>
<CipherValue>aD+gk5jLCGwL494yuTwcSFApmbQspa
vshFrB0QkL51ohDgANj4JijTHgi3WakkcZ0A/JcJPhd
oyKtugEuhKQd6I6i11NtkOG2SX6sUNBIoCbI6orTtej
2YtaIbzipL1/gMwA0L5zRgQr3LF9OCxslM1wySfvd7/
zCAaPvsxrZoy2KkWk/Wv3rRQZOKkFwuUct3093aY2NS
cPETAanDavOYTV93de9+pwiBCMaxX/Jzr7hwkTJV426
i+RRZNrDZH57jr0+rn4iO2nbNVuVPKjt73U8BUV2wAR
```
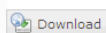
➡ Submit

Clicking the Submit button will provide a Response code that must then be copied and pasted back into to the software.

Manual Request

Response

To copy the response (so that you may paste it into the application from which the request orignated), right-click in the box below and click "Select All." Then right-click in the box again and click "Copy." Alternatively, you may click the "Download" button underneath the box to save the response to a file.

```
<?xml version="1.0" encoding="utf-8"?>
<ActivateInstallationLicenseFile>
  <EncryptedData Id="PrivateData"
Type="http://www.w3.org/2001/04/xmlenc#Element"
xmlns="http://www.w3.org/2001/04/xmlenc#">
    <CipherData>

<CipherValue>EG5jNkibTFHzjLT3IQzE3/gF6Bv0D/1PgHGijwjIa1ddCzApB4pBUX3iHHEWsIZNEGX
tq35K1VOwFZHv/Yo+X6mtoZ1QngUtmeG3ApFXpY61CSiq5SfGXmATa/QDAxsE34n4H8Y0a9iOLINpi5/
24tfNuNVpGvg+y1buQvA9gid9xWOnRZPbnEeHqAD4+HafJ3x+OxcK+JgGP+Ae2BcIjbNsUtu7SGnvTss
```

⬇ Download

Paste the Activation Code into the software and click Activate to complete the process.

Step 2: Copy the activation request and paste it into the activation web page:

Activation Request:

```
<ActivateInstallationLicenseFile><EncryptionKeyID>31f7b7cf-3bb9-4fe6-8a5a-
b8b3df99bf5c</EncryptionKeyID><EncryptedData Id="PrivateData"
Type="http://www.w3.org/2001/04/xmlenc#Element"
xmlns="http://www.w3.org/2001/04/xmlenc#"><CipherData><CipherValue>Pkp8lfgUZfFUpqMbgDf
9przNKeMjzpZtUa9IcDaK0JxXgIMZs4C5GIqVDUCdF5DUsiut1Amap2JKsvLBaBoQmrg283gFIqDmycf
Tp7SCG
+RiiWBXqcXW/oC09qosRqcWBw2u/eXxxTGRU8HVjXg4Z8W659ONAUeQ0Y/JV5KfT1q0LFDJhSc
4d/d8d7jj9b7gXHe8lx0MBa5X6bihNgLDPxGr6ExsyoHo0mwqlOqF1RoduigrVpdL45wYj/tQhcnmGtDX
qrYXrxJx50cz9yvSlpfKRNf1Wo4f2tIllyt5/cqqSH3OUh9u0uRFTkbEkiwA2vL/0Z
+1RIN8V8xpm5EDfkwyadp
```

Copy   Open Activation Web Page

Step 3: Copy the Activation Code from the web page, paste it below, and click Activate:
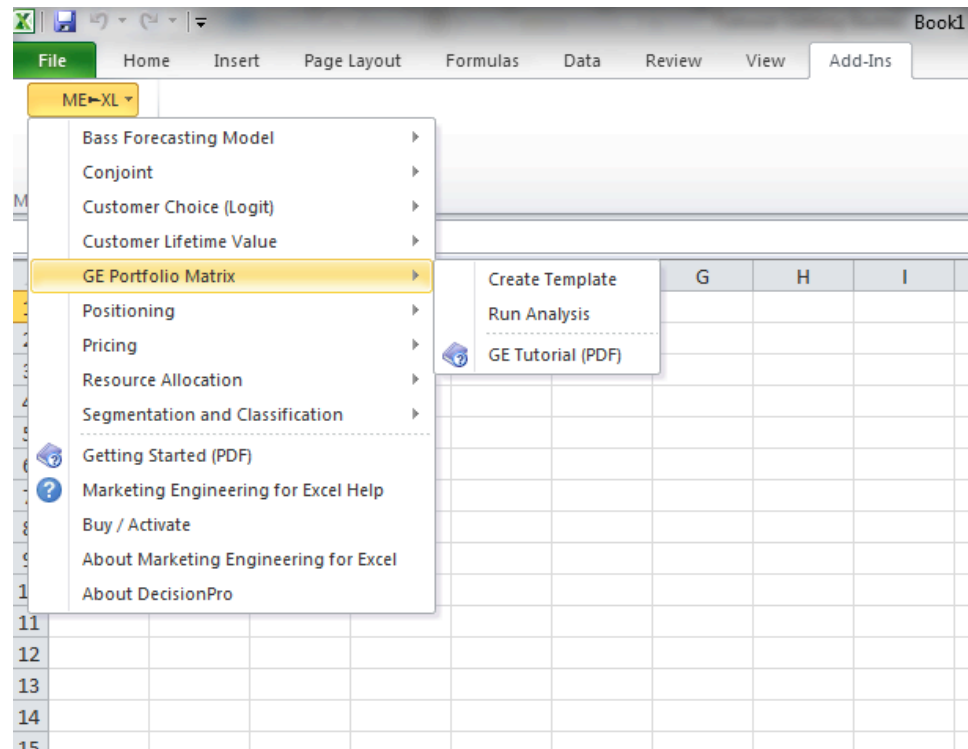
Activation Code:

```
<?xml version="1.0" encoding="utf-8"?>
<ActivateInstallationLicenseFile>
  <EncryptedData Id="PrivateData" Type="http://www.w3.org/2001/04/xmlenc#Element"
xmlns="http://www.w3.org/2001/04/xmlenc#">
    <CipherData>

<CipherValue>EG5jNkibTFHzjLT3IQzE3/gF6Bv0D/1PgHGijwjIa1ddCzApB4pBUX3iHHEWsIZNEGXt
q35K1VOwFZHv/Yo
+X6mtoZ1QngUtmeG3ApFXpY61CSiq5SfGXmATa/QDAxsE34n4H8Y0a9iOLINpi5/24tfNuNVpGvg
+y1buQvA9gid9xWOnRZPbnEeHqAD4+HafJ3x+OxcK+JgGP
```
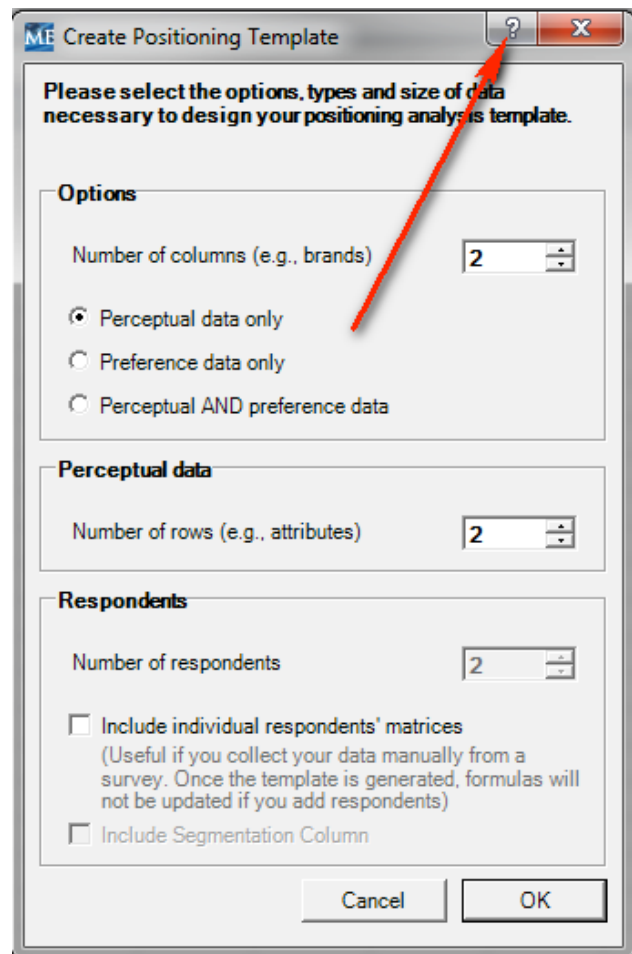
Paste   Activate

Tutorials

ME^{XL} 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^{XL} 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^{XL} 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^{XL} with Excel

The ME^{XL} software is an Excel add-in which allows you to use the full range of Excel capabilities along with your ME^{XL} 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^{XL}.

- All ME^{XL} 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^{XL} output in a presentation.

- ME^{XL} 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^{XL} output.

Additional Resources

The ME^{XL} software implements tools and techniques explained in two books made available through DecisionPro.

Principles of Marketing Engineering, 2nd Edition

(2013, Gary L. Lilien, Arvind Rangaswamy, Arnaud De Bruyn) DecisionPro, Inc., State College, PA.

263 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 website, www.decisionpro.biz.

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