# User Guide

Introduction

The User Guide contains ***important information*** for proper use of the Web-based StLA Survey system. If you have a problem in the use of the system, please contact the survey administrator, either by e-mail at govs.stla@census.gov or by phone at 1–800–451–6235.

Overview

The StLA survey consists of Parts A through N. The entire process consists of seven steps: login, registration, data entry, reviewing the edit report, resolving all edit messages, submitting the survey data, and submitting the State Librarian certification form to certify the accuracy of the data.

Note: Online State Librarian certification of the data's accuracy is a new option this year. After the Key Holder submits the data and locks it, a message will be sent to the State Librarian's e-mail address describing the certification options (electronic or paper). The State Librarian can certify online by simply clicking on a specified link within the e-mail message. The Key Holder will be informed immediately via e-mail if the State Librarian uses this method. Otherwise, the Key Holder should submit the signed certification form to Census by regular mail or fax.
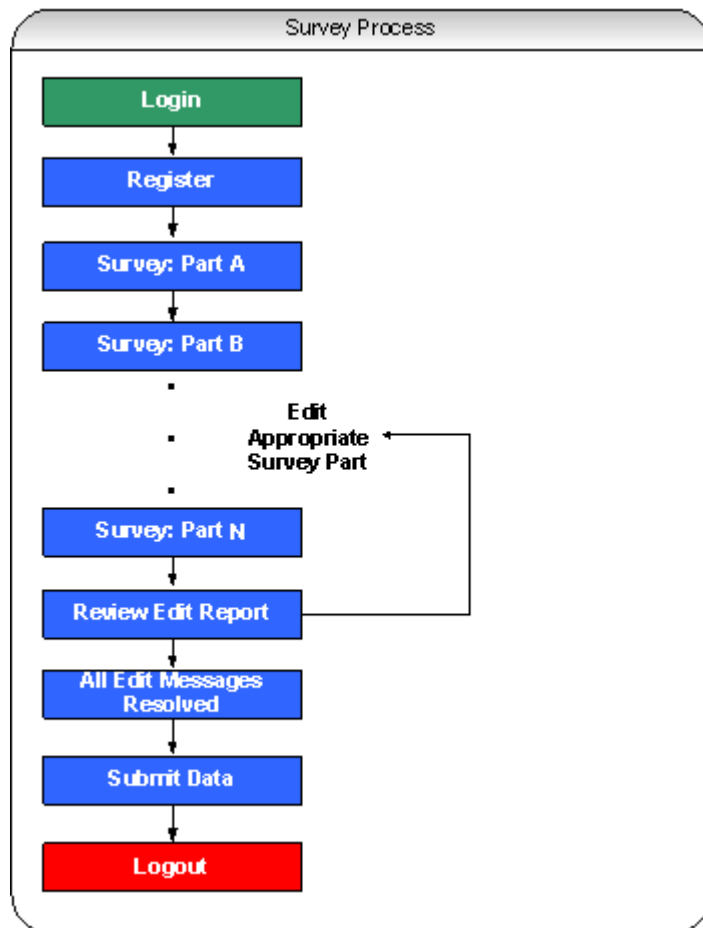
Login

Access to the survey system is granted with a valid user ID and password. After a successful login, the user should select the Continue button to advance to the survey **Part A** page. This page includes a banner with five menus (**Survey**, **Reports**, **Tools**, **Help**, and **Log Off**), and links on the left side of the screen to the **Registration** site and **Parts A to N** of the survey.

The first time you log into the system, you will be required to register. On subsequent logins, you will be taken to the survey **Part A** page.

Registration

Registration must be completed—by providing information for all items with asterisks (**)—prior to entering the survey data. Registration information may be updated (for example, additional users may be added) at any time prior to submitting the survey.

Survey Data Entry

You can begin data entry immediately after completing registration. There is no specific order required for completing the survey. However, we recommend moving from Part A through Part N in sequence, as edits in later sections are affected by entries in earlier sections.

Note: Several screens (e.g., Part A. State Library Agency Identification) are pre-filled with data previously submitted for your agency. **Please update any information that has changed**.

Saving/viewing your data. Data are saved on a screen-by-screen basis. Always click the **Verify & Save** button at the top or bottom of the screen before proceeding to another screen. **Verify & Save** will save your data and keep you on the current screen. The **Proceed** button will advance you to the next screen—you will be prompted to save your data first if you have made changes to the screen. **It is recommended that you save your data frequently.**

Note: When a screen is saved, helpful edit icons will identify data cells that have missing or questionable data. Click on the icon to review the edit message and the required action.

Navigating the survey. Use the **Tab** and **Shift-Tab** keys to move back and forth between the data entry boxes on a survey screen. The **Delete** and **Backspace** keys are active inside each data entry box. You can also move around the data entry screen by positioning the mouse pointer directly on the data entry box, radio button, check box, or pull-down list, and clicking on the left mouse button. In text boxes, a pop-up menu with the **CUT**, **COPY**, and **PASTE** commands appears when the right mouse button is pressed.

Edit Report

The **Edit Report** option is found on the survey page. The **Edit Report** may be viewed on-screen or printed and is in an easy-to-read table having six columns, described below:

- Edit No. (edit message number)
- Line Number (survey item)
- Screen Name (survey part)
- Edit Message
- Severity (edit message type—Fatal or Explanation), and
- Accepted (edit message resolution status—Yes or No)

All edit messages must be resolved (by revising or confirming the data) in order to submit the survey data. To make corrections to the data, click on the survey part (for example, *Part J. Revenue*) in the

"Screen Name" column. To confirm the data, with or without an explanation, click on *Explanation* in the "Severity" column. Your explanations are recorded in the **Edit Report** as "Reasons". The "Accepted" column indicates whether the edit message is resolved ("Yes" or "No"). Once all edit messages are resolved, the "Accepted" column of the **Edit Report** will display "Yes" for each message, and the **Submit Data** button will appear at the top of the survey page. (Subsequent data corrections may generate new edit messages that you will need to resolve before submitting the survey data.)

Note: Two additional options are included on the **Edit Report** page: The **Edit Detail Report** displays the data related to each edit message. This report is provided as a reference tool when reviewing and resolving edit messages. The **Edit Reason Report** lists all edit messages for which the user has provided explanations ("Reasons").

Edit messages are generated for individual survey pages via the **Verify & Save** process. The edit icons serve as links to the edit messages. Clicking on the icon opens an "Edit Description" dialog box containing the edit message and the action required to resolve the message. There are two types of edit messages, each with a unique icon:

- **Fatal** (noted with a red icon). The data must be revised (either missing data must be provided, or correct data must be reported). To provide the required data or to change data that you have previously entered, click **Close** to close the edit message box, and enter or edit the data.

- **Explanation** (noted with a yellow icon). The data are questionable. The user should review the data for accuracy and enter correct data if appropriate. If the questionable data are correct, the user can resolve the edit message in one of two ways: (1) click **Confirm** to verify the data without giving an explanation, or (2) enter an explanation in the memo field provided and click **Save reason**. *Providing an explanation may eliminate the need for future edit follow-up about the data.* You will be prompted to click the **Refresh Screen & Close** button to close the window.

  Note: The Key Holder cannot submit the survey until all data generating "Fatal error" icons have been revised (either missing data must be provided, or correct data must be reported) and all data generating "Confirm or explain" icons have been confirmed or explained.

Submitting the Survey Data

When the survey has been completed and all edit messages have been resolved (the "Accepted" column of the **Edit Report** displays "Yes" beside an edit message when it has been resolved), you will receive the following message: "You are ready to submit data." Note: To submit the data, you must run the **Edit Report.** You must then return to the survey page by selecting "Survey" on the top menu bar--*do not use* the **Back** button of the browser--and then select the **Submit Data** option at the top of the page. If you are on the last screen, and all edit messages are resolved, and you select the **Save** option, you will still need to select the Edit Report option, then select "Survey" on the top menu bar, and finally select the **Submit Data** option.

The Key Holder must select **Submit Data** and lock the data to officially complete the survey data submission process (this also notifies Census that the survey is ready for their review). An e-mail message is sent to the user indicating that the survey data have been submitted.

Note: The State Librarian certification form should be submitted after the data are submitted and locked (see "Overview" section above).

Note: After the user selects **Submit Data**, the data will still be viewable and printable. However, additional changes to the data will not be possible unless the Key Holder submits a request to the survey administrator. ***This action should not be a substitute for entering the correct data initially.*** If you discover an error in your data, contact the survey administrator by e-mail at govs.stla@census.gov or by phone at 1–800–451–6235. The administrator will assist you in correcting any errors and resubmitting the data.

Printing

Printing Blank Forms. A blank version of the survey data entry forms may be opened and printed using the **Survey Form (Blank)** option found on the **Reports** menu. A **Print Form** and **Go back** button are found at the bottom of the blank survey. The **Print Form** button opens a standard print dialog box, while the **Go back** button returns users to the previous page viewed.

Printing Forms with Data. You can print the form after you have entered data via the **Survey Form (Data)** option found on the **Reports** menu. Otherwise, the buttons and steps are the same as for printing blank forms. To print directly from the data entry screens, use the browser **Print** button or the **Print** option (under the **File** menu). A print option is also available from the menu that appears when the right mouse button is pressed.

Other Print Options. You can print the survey **Instructions, Edit Messages and Conditions,** and other information found on the Help menu using the browser and mouse print options discussed above.

Log Off
Users may leave a session at any time using the **Log Off** button found on the banner, before closing the browser. Be sure to save all data before logging off by pressing the **Verify & Save** button. Future logins allow users to continue where they left off.