



Training Manual

Contents

Introduction	1
Typographical Conventions.....	2
Start and Log into NAPIS SRT	3
NAPIS SRT Setup	4
Importing XML Files	5
Importing DBF files	7
Starting From a New Blank Report	9
Report Data Entry	11
Adding Information to a Report	12
Verifying Reports and Correcting Errors	13
Exporting Files	16
Printing Reports	17
Glossary of Terms	19

Introduction

The National Association of State Units on Aging (NASUA), with funding from the Administration on Aging (AoA), has engaged Synergy Software Technologies Inc. to develop a software reporting structure for the State Program Report (SPR) section of the National Aging Program Information System (NAPIS).

This effort was initiated to accomplish three primary tasks:

1. Reduce SUA reporting burden, i.e., client detail information, system edits, validity checks and requirements for transmission.
2. Incorporate required information regarding the National Family Caregiver Support Program.
3. Comply with Office of Management and Budget (OMB) reporting requirements regarding reporting classifications, e.g., race and ethnicity.

The resulting system is the NAPIS State Reporting Tool (NAPIS SRT). NAPIS SRT will help State Units on Aging to create, edit and validate SPRs and to create transmission files for submitting data to AoA. Through this project, the NAPIS SRT will be provided to all State Units on Aging free of charge for use in either a hosted, web based, or locally installed model. Training on use of the system will also be provided to SUAs as part of this project.

About NAPIS SRT

NAPIS SRT offers several features that make preparing a State Program Report (SPR) faster and easier.

- XML and DBF import - many database systems can export to XML and DBF files. Import files destined for NAPIS SRT need to conform to the appropriate schemas supplied by the AoA.
- Clean and efficient spreadsheets for report data entry. The data entry spreadsheets are based directly off of the paper based SPR.
- Error correcting tools - NAPIS SRT offers several tools to help you clean up data for export.
- Flexible print options - you can print out one or more sheets of the report or the whole report quickly and easily.
- Straight forward export - NAPIS SRT creates export files ready for transmission using simple procedures.

About the Documentation and Additional Resources

This training manual is meant to give you an overview of the NAPIS SRT system. It does not contain complete information on the program.

NAPIS SRT has an online help system. At any time, press F1 or make a selection from the **Help** menu to access help. You will find a fully indexed help system with step by step procedures. Synergy Software also offers a PDF version of the documentation which you can print as needed. In a typical installation, the manual can be found in C:\Program Files\NAPIS SRT. The manual contains the same information as the online help system.

If you need additional help, check Synergy Software's website for more information. Our web address: <http://www.synergysw.com>.

And lastly, our friendly sales staff can direct you to additional training resources. Please email info@synergysw.com or call 802-878-5814.

Typographical Conventions

Before you start using this guide, it is important to understand the terms and typographical conventions used in the documentation.

For more information on specialized terms used in the documentation, see the Glossary at the end of this document.

The following kinds of formatting in the text identify special information.

Formatting convention	Type of Information
Triangular Bullet(➤)	Step-by-step procedures. You can follow these instructions to complete a specific task.
Special Bold	Items you must select, such as menu options, command buttons, or items in a list.
<i>Emphasis</i>	Use to emphasize the importance of a point or for variable expressions such as parameters.
CAPITALS	Names of keys on the keyboard. for example, SHIFT, CTRL, or ALT.
KEY+KEY	Key combinations for which the user must press and hold down one key and then press another, for example, CTRL+P, or ALT+F4.

Start and Log into NAPIS SRT

Welcome! The goal of NAPIS SRT is to make it easier for states to create an SPR and reduce errors on the reports finally transmitted to the AoA. This training guide is a tutorial meant to walk you through using the major features of NAPIS SRT.

Let's begin by starting and logging into the program.

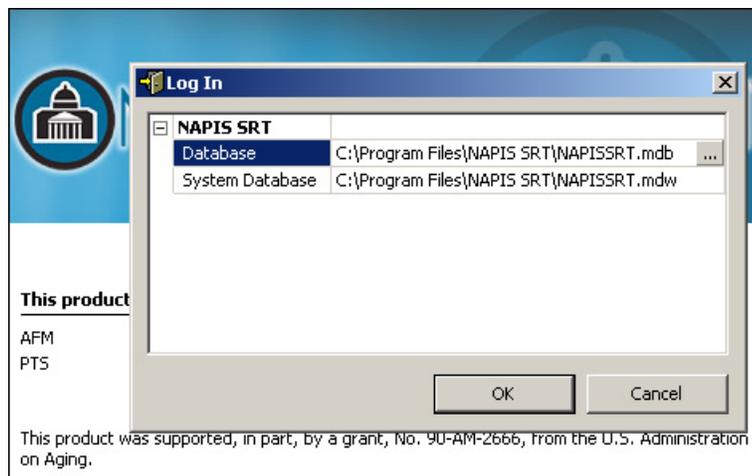
➤ **To start and log into NAPIS SRT**



- 1 Double-click on the **NAPIS SRT** desktop icon.

-OR- From the Windows **Start** menu, select **Programs** (or **All Programs** in Windows XP), **NAPIS SRT**, and then the **NAPIS SRT** icon.

- 2 Your computer will display a screen with program information and then the NAPIS SRT *Log In* screen.



- 3 Click **OK** to start the program.

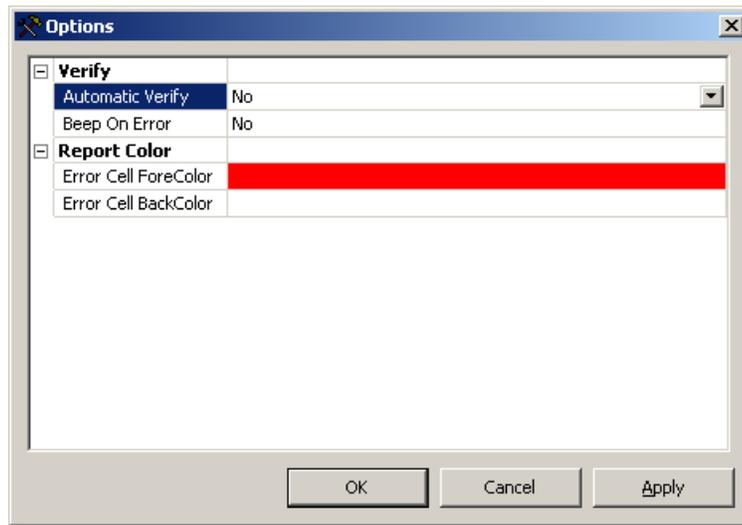
NAPIS SRT Setup

Before we begin using SRT, let's verify that the program options are set correctly. This also gives us a chance to show you where you can change settings and options in NAPIS SRT.

➤ **To change NAPIS SRT's verification options**

- 1 Click **Options**  on the toolbar.

-OR- From the **Tools** menu, select **Options**.



- 2 Double check that NAPIS SRT *Automatic Verify* and *Beep on Error* are set to **No**.

When *Automatic Verify* is set to **Yes**, NAPIS SRT will check any changes made on each cell on a report. This feature is useful for getting rid of the last few errors in a report. *Automatic Verify* is typically set to **No** during the initial import or creating of an SPR to reduce distractions while editing.

NAPIS SRT can make a sound when it finds an error at the cell level. To hear a beep, select **Yes** in *Beep on Error*. For the purposes of this tutorial, we'll set *Beep on Error* to **No**.

- 3 You'll also see *Error Cell ForeColor* and *BackColor* under the *Appearance* heading. When NAPIS SRT finds an error it will change the text color to the *ForeColor* and change the background to the *BackColor* of the appropriate cell.
- 4 When finished making changes, click **OK**.

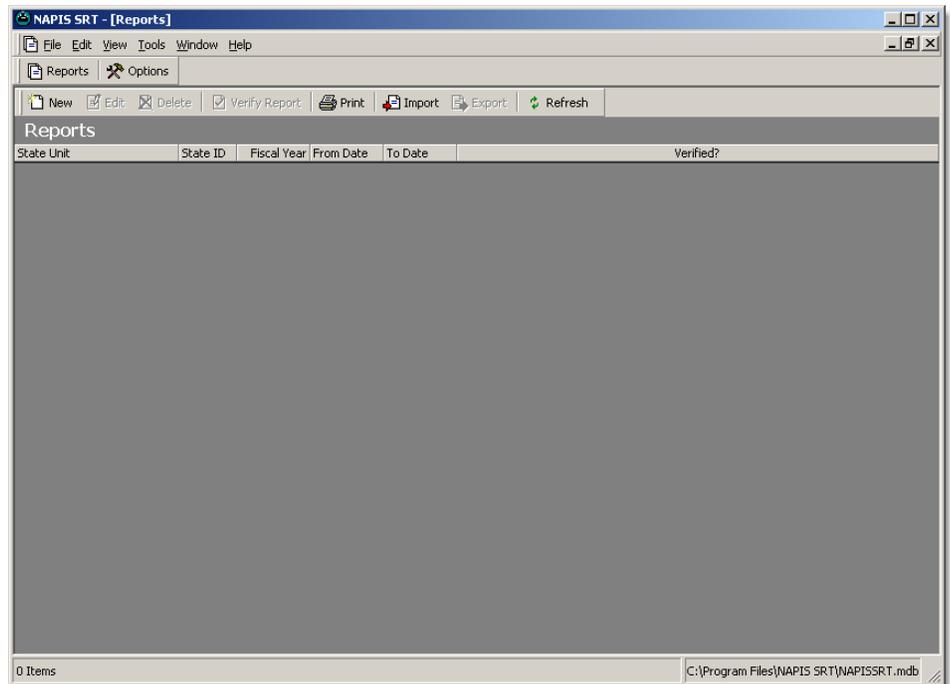
Importing XML Files

NAPIS SRT can import SPRs from properly formatted XML and DBF files. We will begin by importing from an XML file to see how to create SPRs from external files created by third party systems. The XML schema needed to create a properly formatted import file is available from the AoA.

➤ **To import SPRs from an XML file**

- 1 Click **Reports**  on the toolbar.

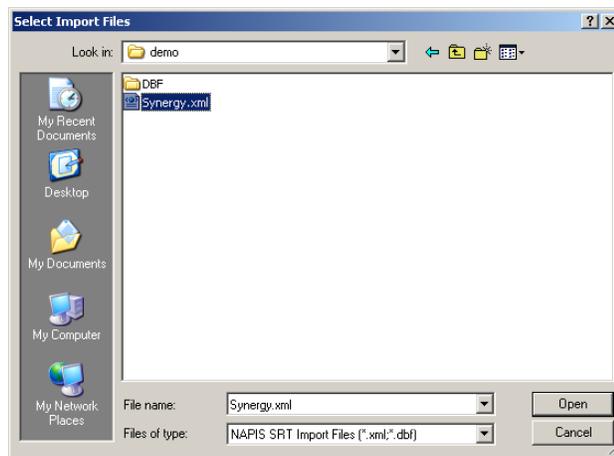
-OR- Select **Reports** from the **View** menu. -OR- CTRL+R



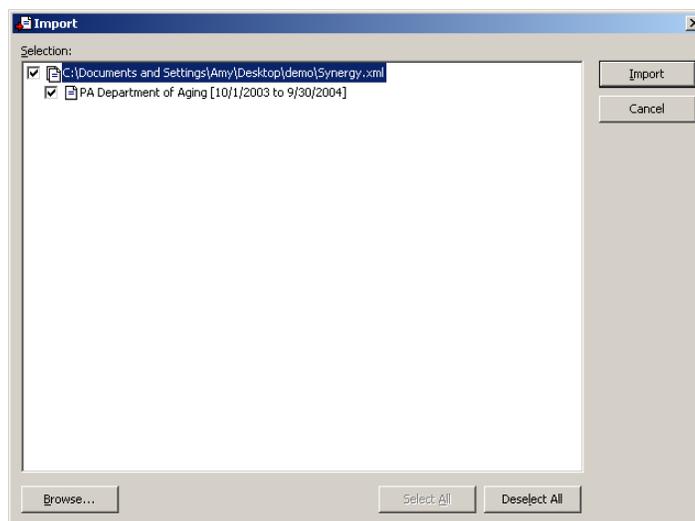
- 2 Click **Import**  on the toolbar.

-OR- Select **Import...** from the **Tools** menu. -OR- CTRL+I

- 3 If necessary, navigate to the folder of the import file. Highlight the "Synergy.xml".



- 4 Click **Open**.



- 5 In the *Import* screen, check the reports you want to import. Use **Select All** to check all files and reports. **Deselect All** removes all checks. In our case, there is only one report.
- 6 Click **Import** to bring all checked reports into NAPIS SRT.
- 7 Click **OK** at the prompt.

You can import from more than one XML file at a time. Click **Browse...** to select SPRs from more than one import file.

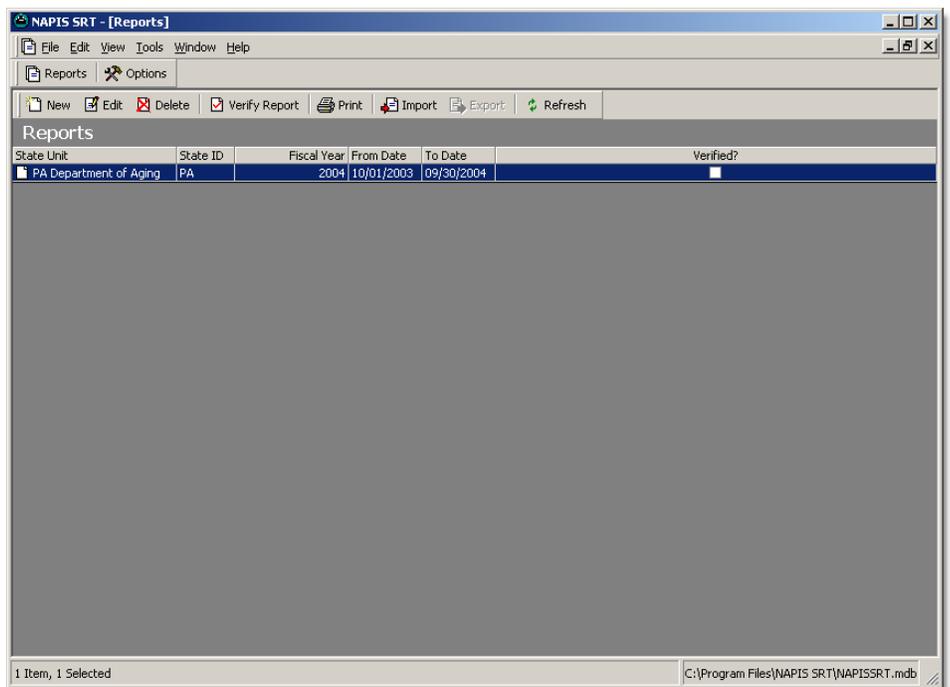
Importing DBF files

We've successfully imported an SPR from an XML file. Now let's take a look at the procedure again to import a DBF file.

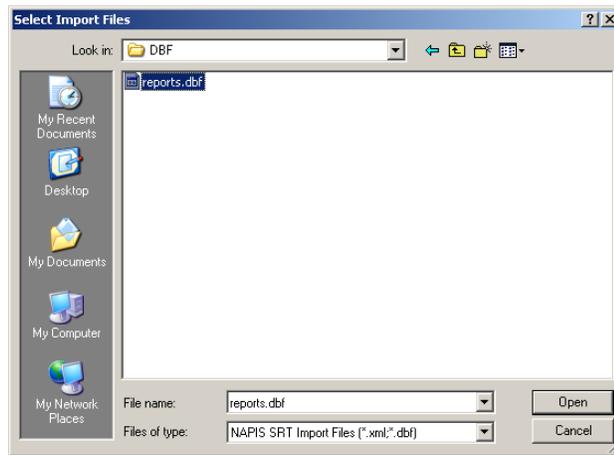
➤ **To import SPRs from a DBF file**

- 1 Click **Import**  on the toolbar.

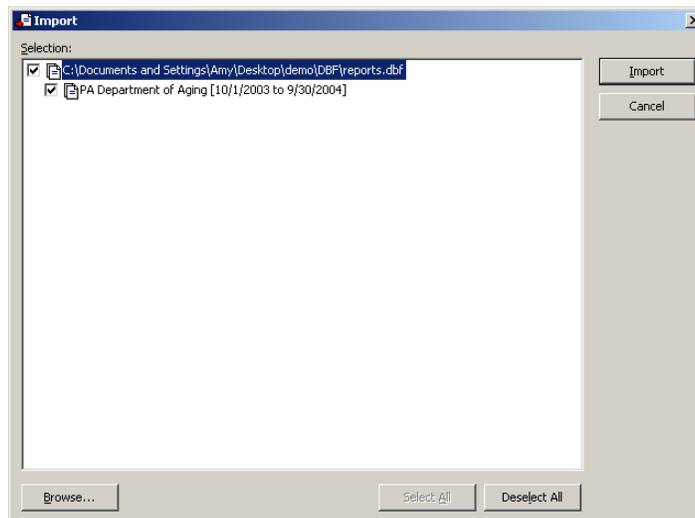
-OR- Select **Import...** from the **Tools** menu. -OR- CTRL+I



- 2 Navigate to the folder of the import file. Highlight "reports.dbf."



- 3 Click **Open**.



- 4 In the *Import* screen, check the reports you want to import. Use **Select All** to check all files and reports. **Deselect All** removes all checks. In our case, there is only one report to import.
- 5 Click **Import** to bring all checked reports into NAPIS SRT.
- 6 Click **OK** at the prompt.

You can import from more than one DBF file at a time. Click **Browse...** to select SPRs from more than one import file.

Starting From a New Blank Report

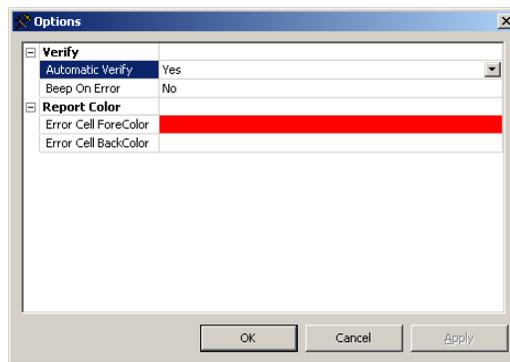
Now that you've seen how to import SPRs, let's create a new report from scratch. We can also use this time to demonstrate cell level verification. First, let's change NAPIS SRT's automatic verify option.

➤ **To change cell level verification options**

- 1 Click **Options**  on the toolbar.

-OR- From the **Tools** menu, select **Options**.

- 2 Change *Automatic Verify* to **Yes**.



- 3 When finished making changes, click **OK**.

Now let's create a new SPR.

➤ **To create a new state program report**

- 1 Click **Reports**  on the toolbar.

-OR- Select **Reports** from the **View** menu. -OR- CTRL+R

- 2 Click **New**  on the toolbar.

The *From* and *To* dates need to be 10/01 and 09/30 , matching the Federal fiscal year, to create a Verified report.

3 Enter the information shown below.

State Unit	PDA
State ID	PA
Note:	Federal fiscal year is October through September (10/1 to 9/30).
Fiscal Year Start Month	October
Fiscal Year	2005
From Date	10/01/2004
To Date	09/30/2005
Comments	
Copy Accomplishments?	No

OK Cancel

4 Click **OK**.

Report Data Entry

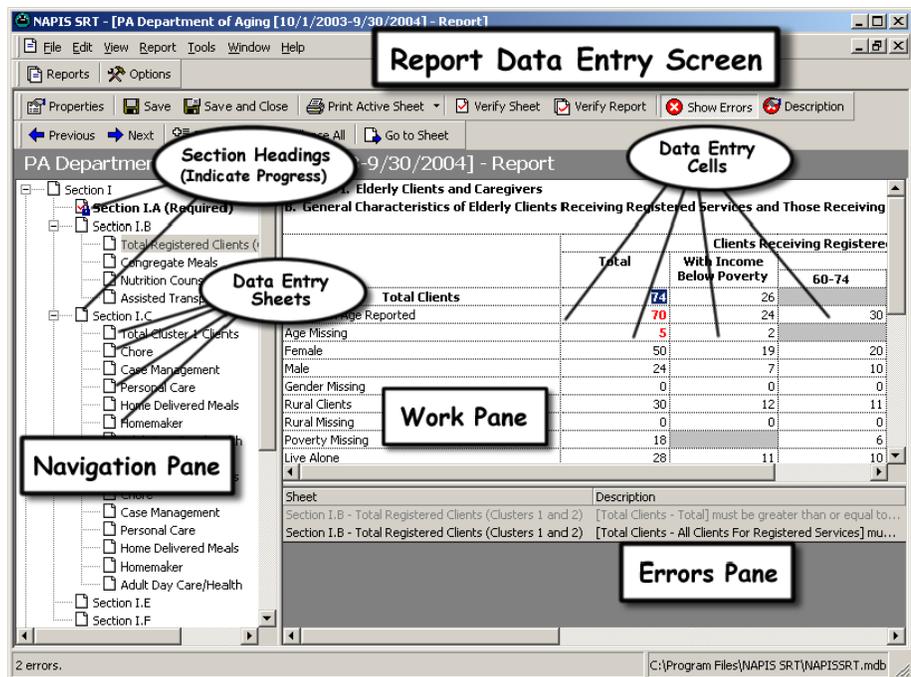
NAPIS SRT uses clean, efficient spreadsheets for most of the data entry into an SPR. The look of the sheets is based on the paper SPR used to gather and report data. The spreadsheets are organized by the *Title* and *Section*.

Using the Report Data Entry Screen

To begin data entry, click on the plus sign \oplus next to an appropriate section in the *Navigation* pane. You cannot enter data into most *Section Headings*. They are there to organize the data entry sheets within the report and display your progress. A check mark means the section has been verified. Lines in a section heading icon means that you've made changes that have not been saved. A blank icon indicates that either the section has not been entered or all changes to that section have been saved, but not verified. You will see a lock icon on the required sections that must be filled out and verified to create a verified report.

Each section contains one or more sheets, based on the paper version of the SPR. You enter data directly into these sheets. After highlighting an appropriate sheet, NAPIS SRT will display it in the *Work* pane. Highlight a *Data Entry Cell*. Use your keyboard to enter the number or text. Use the ENTER key or the RIGHT arrow to move onto the next cell.

Most of the sheets are organized with the *Total* column on the left with overall *Totals* in the upper left. If you are used to seeing number totals in the lower right, pay attention to the reversal of the total locations.



After verifying the data, NAPIS SRT will display any errors in the *Errors* pane in the lower right. Use the **Show Errors**  button on the toolbar to bring the *Errors* pane in and out of view. To see an entire error description,

Adding Information to a Report

highlight the error and click **Description**  on the toolbar.

Let's add data to the APR and see how cell level verification works.

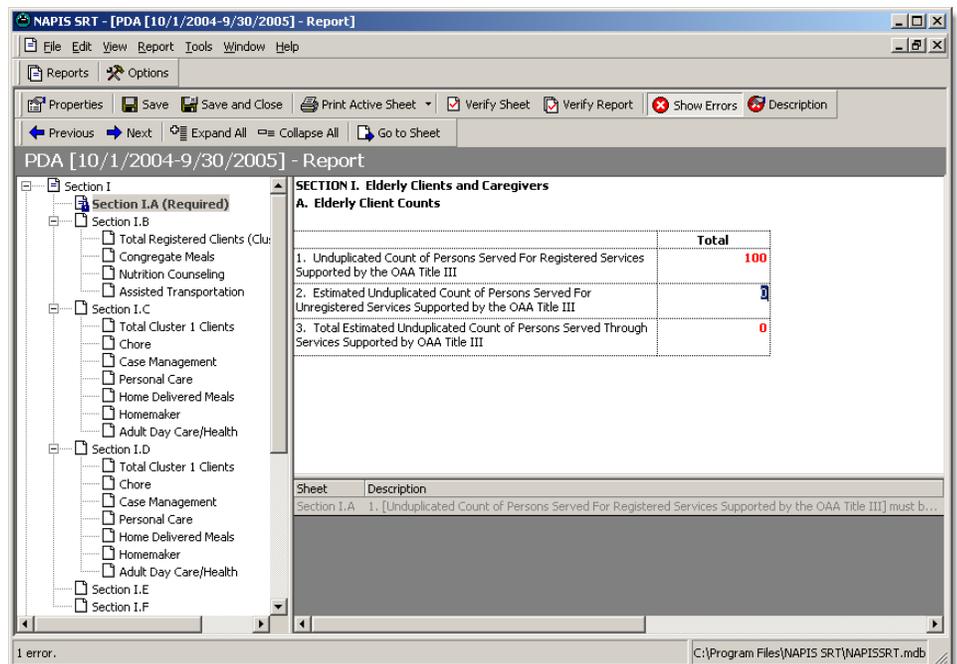
➤ To enter information in the report

- 1 Click on Section 1.A. The report section will appear in the work pane on the left.

Most section headings are not used for data entry, unlike Section 1.A. You'll enter most of the data in the sheets organized under the section headings.

Also notice that Section 1.A is a required section. Required sections in an SPR must be filled in (non-zero) and error free to pass report verification and be ready for transmission to the AoA.

- 2 Enter "100" in field 1 as shown below:



NAPIS SRT - [PDA [10/1/2004-9/30/2005] - Report]

File Edit View Report Tools Window Help

Reports Options

Properties Save Save and Close Print Active Sheet Verify Sheet Verify Report Show Errors Description

Previous Next Expand All Collapse All Go to Sheet

PDA [10/1/2004-9/30/2005] - Report

Section I

Section I.A (Required)

Section I.B

Total Registered Clients (Clu...

Congregate Meals

Nutrition Counseling

Assisted Transportation

Section I.C

Total Cluster 1 Clients

Chore

Case Management

Personal Care

Home Delivered Meals

Homemaker

Adult Day Care/Health

Section I.D

Total Cluster 1 Clients

Chore

Case Management

Personal Care

Home Delivered Meals

Homemaker

Adult Day Care/Health

Section I.E

Section I.F

SECTION I. Elderly Clients and Caregivers

A. Elderly Client Counts

	Total
1. Unduplicated Count of Persons Served For Registered Services Supported by the OAA Title III	100
2. Estimated Unduplicated Count of Persons Served For Unregistered Services Supported by the OAA Title III	0
3. Total Estimated Unduplicated Count of Persons Served Through Services Supported by OAA Title III	0

Sheet Description

Section I.A 1. [Unduplicated Count of Persons Served For Registered Services Supported by the OAA Title III] must b...

1 error.

C:\Program Files\NAPIS SRT\NAPISRT.mdb

- 3 When you click in field 2, you'll see that NAPIS SRT changes the color of field 1. The program highlights the error created by the zeros in fields 2 and 3.
- 4 Enter "50" in field 2 and "150" in field 3.
- 5 You'll see that text/cell colors change back to the default after you correct the error and save the report.

Verifying Reports and Correcting Errors

- 6 Click **Save**  on the toolbar.

Our next topic is report verification and error correction. Thus far we've seen how NAPIS SRT can check for problems as you enter data into cells. Once you've completely filled out a sheet, use SRT's sheet verification. Sheet verification confirms that the particular section of the SPR displayed on the screen conforms to NAPIS specifications.

Even if you have verified each sheet within an SPR, you will still need to verify the whole report to export a signed package. If you have not yet entered data into certain parts of the report, *Verify* will skip over sheets with all zeros.

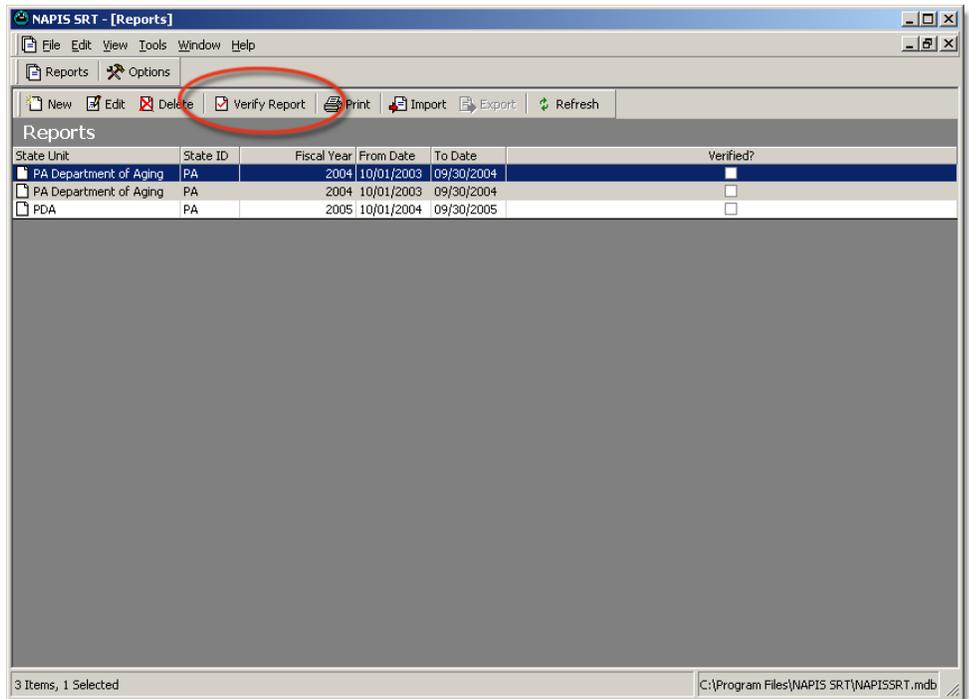
When you verify an SPR, any errors will appear in the *Error* pane in the lower right of the screen. Numbers in cells related to the errors will change color.

➤ **To verify a single sheet**

- 1 Highlight Section 1.A in the *Navigation* pane.
- 2 Click **Verify Sheet** .
- 3 Click **Save and Close** .

➤ **To verify a report for signature and transmission**

- 1 Highlight the first report in the list.



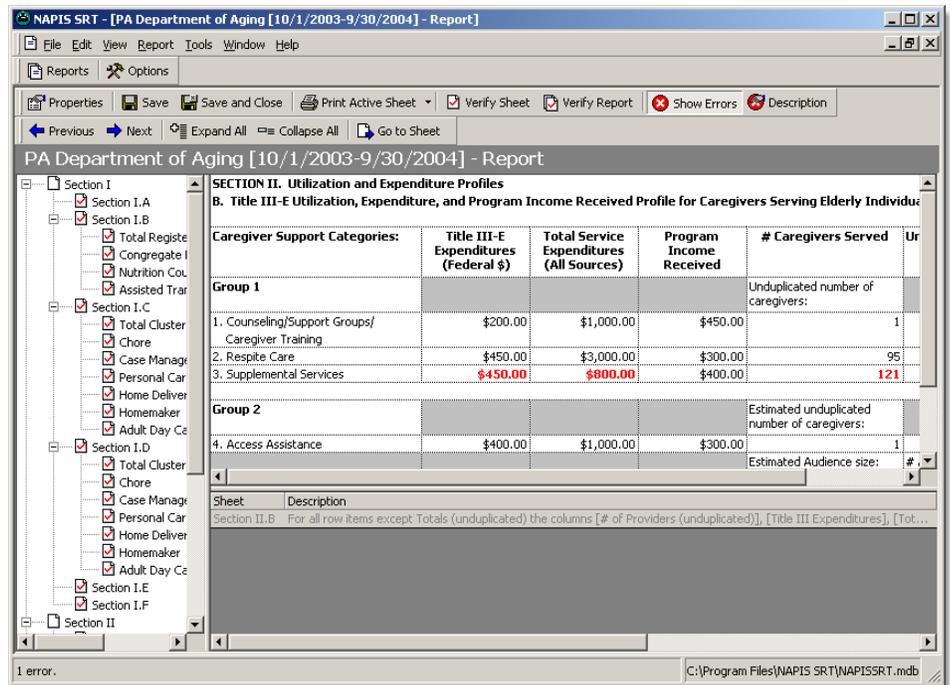
- 2 Click **Verify Report**  on the toolbar.
- 3 NAPIS SRT will display the *Report Data Entry* screen. It will take a minute or two (or longer depending on the speed of your computer) for the program to verify the whole report.
- 4 NAPIS SRT will show any errors in the *Errors* pane displayed below the *Work* pane. Highlight the error you see in the *Errors* pane.
- 5 To view a description of the error, highlight the item you wish to see in the *Errors* pane and click **Description** . Click **OK** after viewing the description.

You can print the list of errors displayed in the Error Pane. From the **File** menu, select **Print** and then **Print Errors....** See **Printing Errors** for more information.



- 6 Click **OK**.

- 7 Highlight the error again. Click **Go to Sheet** . NAPIS SRT will bring you the sheet producing the error.



- 8 Scroll over to the far right in the *Work* pane. Enter 1.0 in *Units of Service* and 10 in *# of Providers (unduplicated)* in the *Supplemental Services* row. You'll see that NAPIS SRT changes the text color of the error cells and removes the error from the pane when you click any error-free row.

- 9 Click **Verify Report** .

- 10 Once the program successfully verifies the report, you will see a prompt. Click **OK** at the prompt.



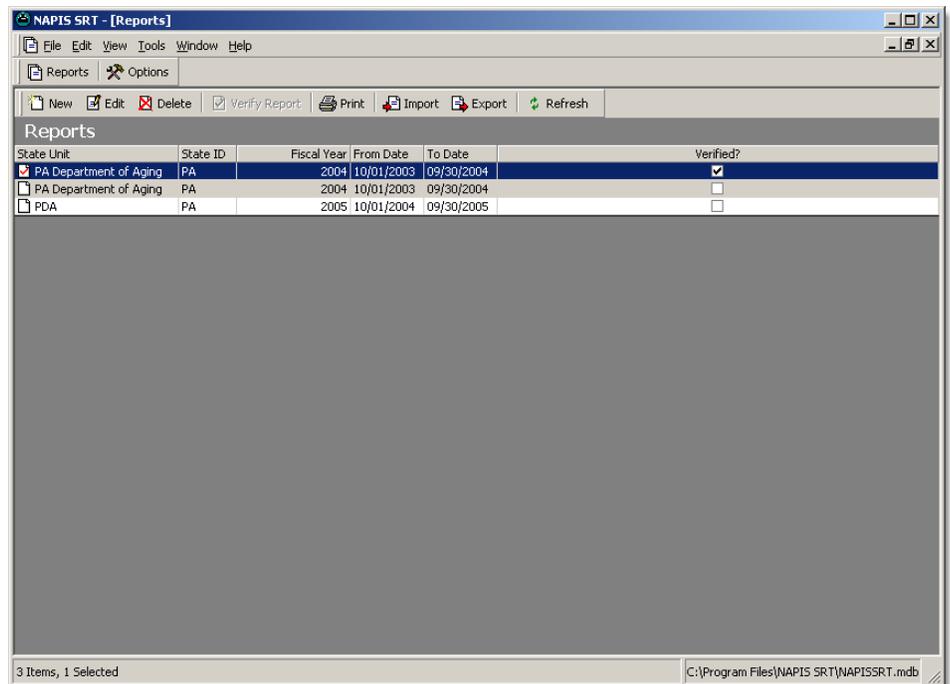
- 11 Click **Save and Close**  to save and close the verified report.

Exporting Files

NAPIS SRT can only export verified reports.

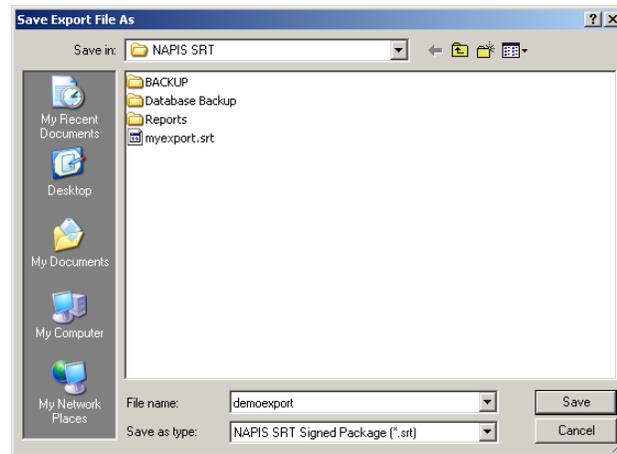
➤ **To create a signed export package ready to go to the AoA**

- 1 Highlight the first report, which is now verified. Verified reports have a check mark over their icon and in the *Verified?* column.



- 2 Click **Export**  on the toolbar.

-OR- From the **Tools** menu, select **Export...** -OR- CTRL+E



- 3 Navigate to the folder where you want to store the export file.
- 4 Enter "demo export" in *File name*.
- 5 Click **Save**.
- 6 NAPIS SRT will create a signed export file ending in ".srt".
- 7 Click **OK** when prompted.

Printing Reports

- 8 Congratulations! You've created an export file ready for transmission to the AoA.

SRT offers a variety of printing options. This last exercise demonstrates how to print selected sheets from the SPR,

➤ **To print out select sheets from a report**

- 1 Click **Reports**  on the toolbar.

-OR- Select **Reports** from the **View** menu. -OR- CTRL+R

- 2 Highlight the first report.

- 3 Click **Print**  on the toolbar.

-OR- Select **Print Report...** from the **File** menu. -OR- CTRL+P

- 4** Click **Deselect All**.
- 5** Check "Total Registered Clients" under Section 1.B and "Total Cluster 1 Clients" under Section 1.C.
- 6** Click on the pull down to the left of **Print Active Sheet**. A new menu will appear.
- 7** Select **Print Selected Sheets**. NAPIS SRT will print all the sheets checked in the right *Navigation* pane.
- 8** Select a printer. Change printing **Preferences** as needed.
- 9** Click **Print**.

Glossary of Terms

A

AoA

Federal Administration on Aging. Part of the Dept. of Health and Human Services. Website: <http://www.aoa.gov>

D

DBF

A database file using the xBase (dBase) format. NAPIS SRT can import SPRs from DBF files formatted to the schema provided by the AoA.

E

Export Package

An export file produced by NAPIS SRT with one or more program reports. An export package maybe verified (signed) or unverified (unsigned).

N

NAPIS

National Aging Program Information Systems - see <http://www.aoa.gov> for more information.

S

Sheet

A section or part of an SPR. A sheet in NAPIS SRT corresponds to a sheet in the printed version of the SPR.

Signature or Signed

When a verified SPR is exported, the export file receives a signature that the data is ready for transmission.

SPR

State Program Performance Report - required by the AoA from each state. Reports information on the effectiveness of social programs geared towards the elderly under the Older Americans Act. Also the extension of a verified, signed file ready for transmission to the AoA.

SRT

State Reporting Tool - Software developed through a grant from the AoA and offered by Synergy Software Technologies Inc. to verify SPRs transmitted to the AoA.

X

XML

Extensible Markup Language - a way of formatting data files. Uses tags similar to HTML (webpages) to delineate data. NAPIS SRT can import from XML formatted to the schema provided by the AoA.