User's Guide

1.4

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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). The NAPIS SRT will help State Units on Aging to create, edit and validate SPRs and to create transmission files for submitting data to the 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

The goal of the documentation is to describe the procedures and provide any extra information you will need to use the program. In the case of the printed manual, the documentation was not meant to be read cover to cover. If you are comfortable using the Windows® operating system, skip to *Using NAPIS SRT* (on page 25) for an outline of how to use the software.

Documentation Sections

Installing NAPIS SRT (on page 6) - step by step instructions on how to install NAPIS SRT.

Working in NAPIS SRT (on page 15) - for the novice computer user. *Working in NAPIS SRT* describes the parts of the screen and explains how to use screen features.

Using NAPIS SRT (on page 25) - step by step procedures used to get your data ready for transmission. The first part of the section outlines the process of using the program.

Administering NAPIS SRT (on page 53) - describes way to customize the program and how to do a simple backup of program data.

We are always looking to make our documentation better. Please contact Synergy Software support (email: info@synergysw.com or phone: (802) 878-8514) if you find any errors or have any comments or suggestions.

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.

|	
Emphasis	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.

Installing NAPIS SRT

Installing NAPIS SRT is similar to installing most Windows® based programs. If you decide that you don't want to install NAPIS SRT, click the **Cancel** button at any time during the process.

Please check the *System Requirements* (on page 13) to make sure your computer meets the minimum hardware specifications before installing the program.

➢ *To install NAPIS SRT*

1   Quit any open or running programs.

2   Insert the NAPIS SRT CD into the CD-ROM drive. Proceed with step 6 if the CD runs automatically. If it does not run, go to step 3.

3   On the Windows® desktop, double-click **My Computer**.

4   Browse to the location where you downloaded the file or to your computer's CD drive.

5   Double-click on **Setup.exe** (The file may just say **Setup**, depending on your view in Windows Explorer.)
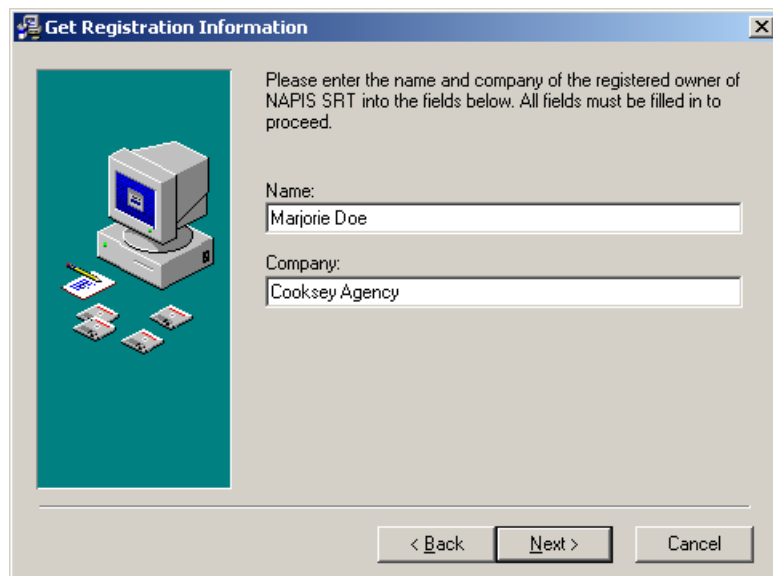
6   Your computer should display the *Welcome* screen.
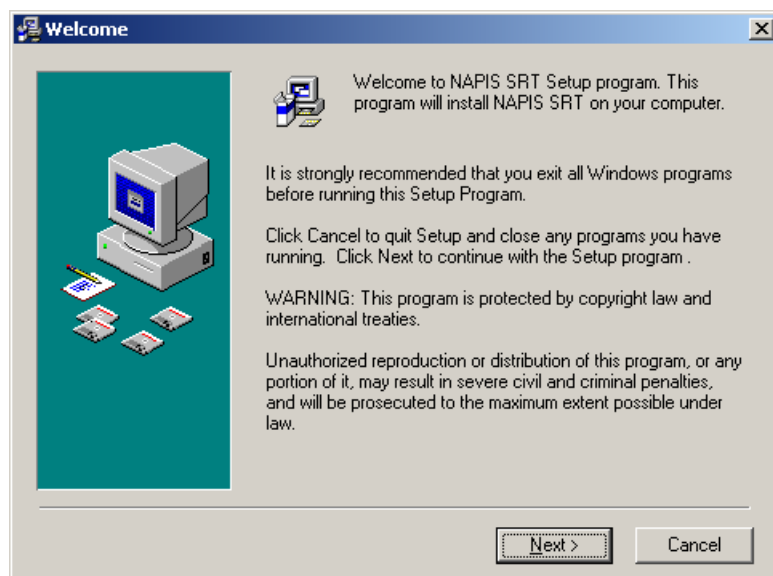
7   Click **Next>**.

**8** Read through the license agreement and then click **I accept the license agreement**.

9 Click **Next>**.

10 Enter your name and the name of your organization on the *Registration Information* screen.

11 Click **Next>**.

12 Choose a directory for the program. The default install directory is *NAPIS SRT* in the *Program Files* directory on the machine running the install program. (C:\Program Files\NAPIS SRT)

Depending on the software policies of your organization, you may need to install NAPIS SRT on a shared server. Please check with your system administrator for guidance.

To install NAPIS SRT in a different directory, click **Browse...**.
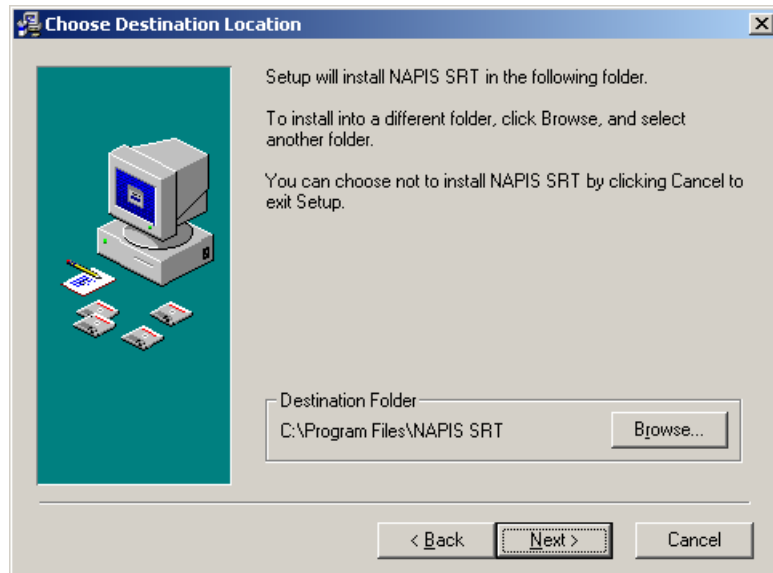
**13** When the *Destination Folder* is correct, click **Next>**.

14 Choose whether or not you wish to backup files to allow for an installation roll-back. By selecting **Yes**, the install program backs up DLLs and any other components of the operating system that the program installation will change. A roll-back allows you to restore the operating system to its state previous to installing NAPIS SRT.

Make any changes as necessary to the *Backup File Destination Directory* by clicking **Browse...**.

If you are unsure about roll-back, leave the default settings.

15 Click **Next>**.
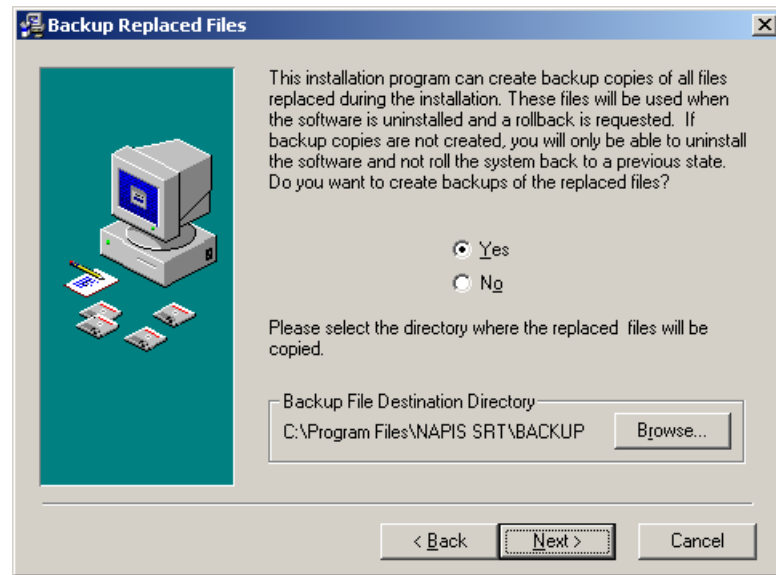
16 Choose the *Program Manager* group where the install program will place the NAPIS SRT icon. The *Program Manager* is the set of menus you see when you select **Start**->**Programs** or **Start**->**All Programs** in Windows®. Leave the default if you don't have a preference.
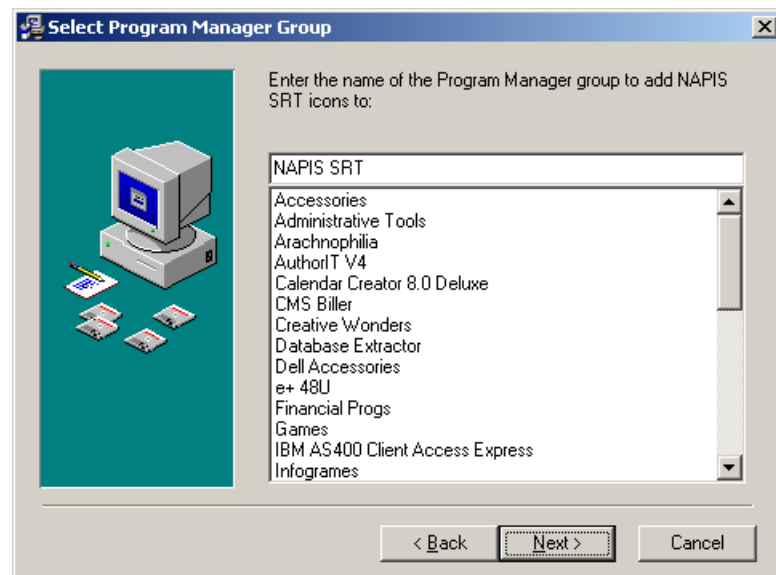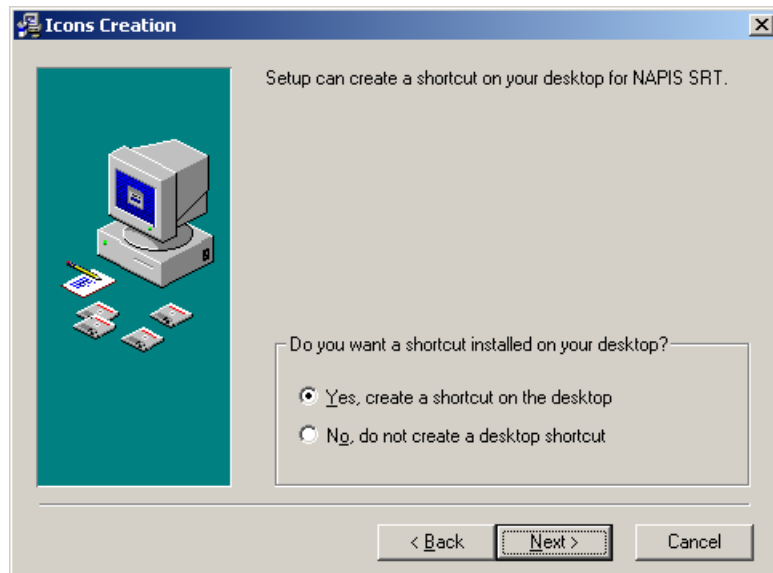

17 Click **Next>**.

18 Select if the menu icons you chose in the previous step will be available to just your Windows login or to all people who log into the computer. This option only appears in Windows NT/2000 or Windows XP machines.
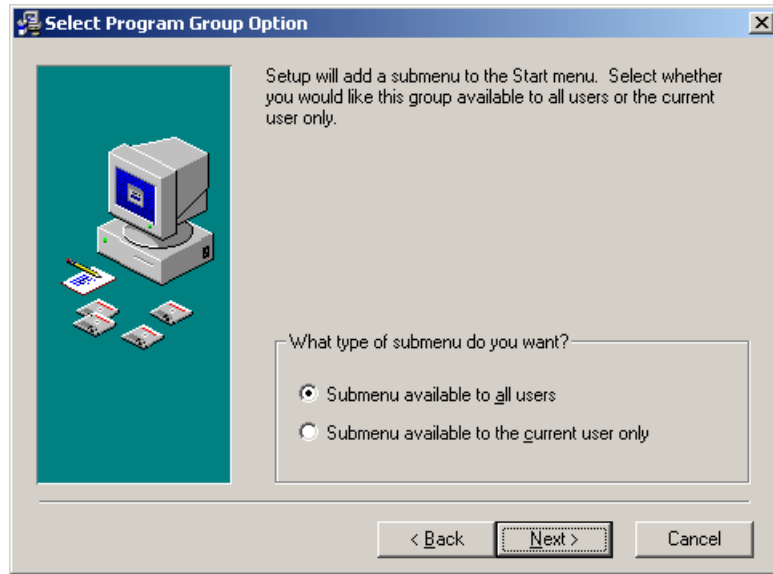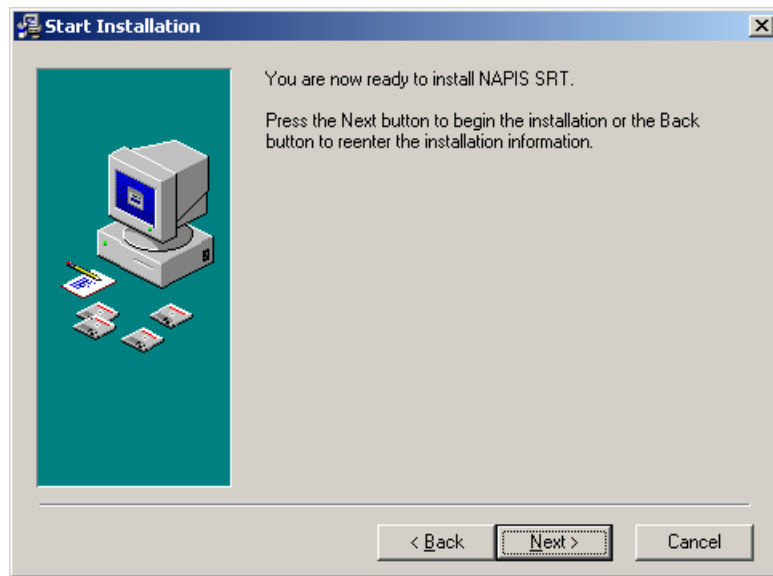

19 Click **Next>**.

20 The installation program can create an NAPIS SRT icon on your desktop. Choose *Yes, create a shortcut...* to give yourself quick access to the program. You can always access NAPIS SRT through the **Start** menu in Windows®.
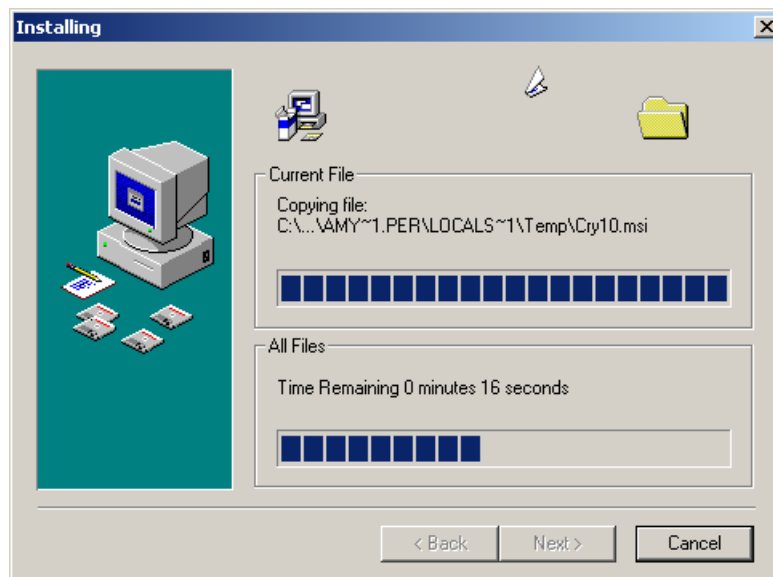

21 Click **Next>**.

22 Click the **<Back** button to make any changes to the installation settings. Click **Next>** to begin the install.

23 The installation program will start copying files to the appropriate directory and make changes to your computer's settings. Please wait while the installation program runs.

24 When the installation program finishes, you have the option of reviewing the release notes. Check the *View Release Notes* box to kick off a web browser that will display the release notes. To exit the installation, click **Finish**.
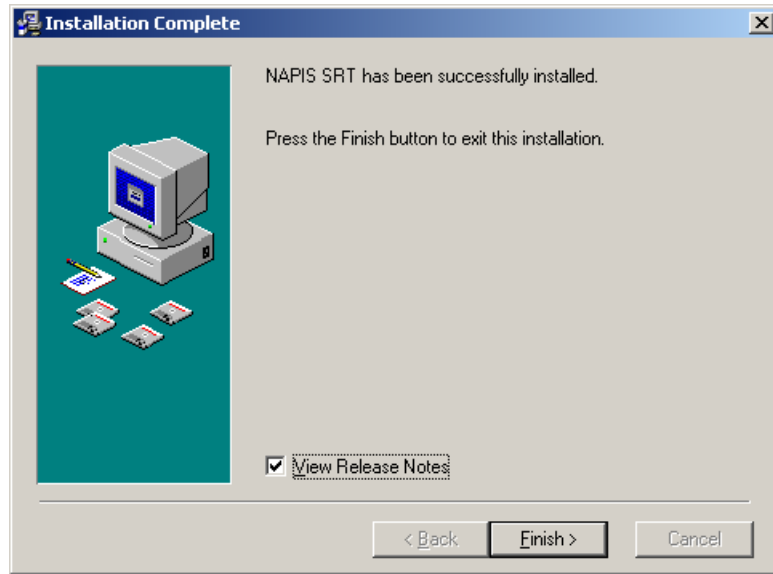
25 You will not need to reboot your computer. NAPIS SRT is ready to go!

System Requirements

The system requirements for NAPIS SRT are similar to the OmniaSystem® offered by Synergy Software.

System Requirements for NAPIS State Reporting Tool for Windows 98/Me/2000/XP:

- 256 MB available memory
- 400 MHz Pentium class III processor or better
- Display resolution of 800x600 or higher
- Microsoft Internet Explorer 5.5 or later with 128-bit encryption

Working in NAPIS SRT

Working in NAPIS SRT describes screen features and basic procedures, including starting and exiting the program.

If you are comfortable using Windows® based programs, you will probably want to skip most of this section. You maybe interested in the information in ***Formatting Columns*** (on page 20) which describes ways to customize the main list screen in NAPIS SRT.

If you are not confident in using Windows or are new to using a computer, read through most of this section. It should help you better understand how to work in NAPIS SRT.

Using NAPIS SRT (on page 25) contains step by step procedures on how to create, edit, and export program reports.

Start and Log In

➢ *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.
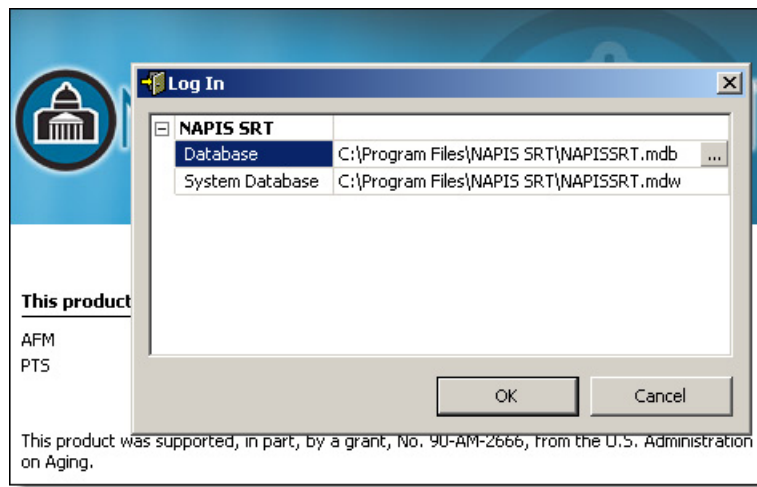
3   If necessary, change the *Database* and *System Database* files. To change a file, highlight either the *Database* or *System Database* row. Click the **Browse** ⊡ button. Navigate to the correct file and click **Open**. If you are unsure about which files to use, leave the default.

4   Click **OK** to start the program.

Switching Databases

You can switch to another NAPIS SRT database without exiting the program.

➢ *To switch to a different database without closing NAPIS SRT*

1   From the **File** menu, select **Log In...**.

2   To change the *Database* file, highlight the *Database* row. The *Database* file stores the data and settings for your organization's SPRs. A valid database filename ends in .mbd.

3   Click **Browse** ⊡.

4   Navigate to the appropriate file.

5   Click **Open**.

6   To change the *System Database*, highlight the *System Database* row. The *System Database* stores important settings about the NAPIS SRT program, but not the actual data. A valid *System Database* file ends in .mdw.

7   Click **Browse** ⊡.

**8**   Navigate to the appropriate file.

9   Click **Open**.

10 Click **OK** in the *Log In* screen to access the new database.

Data Tree

NAPIS SRT displays the structure of a program report in a *Data Tree*. Data trees organize the screen to make it easier to locate and enter information.

In a data tree, individual sheets are grouped together under a section heading. Each heading is called a "node." Tree nodes can be "expanded" to display all the fields under them, or they can be "collapsed" to hide the fields from view.
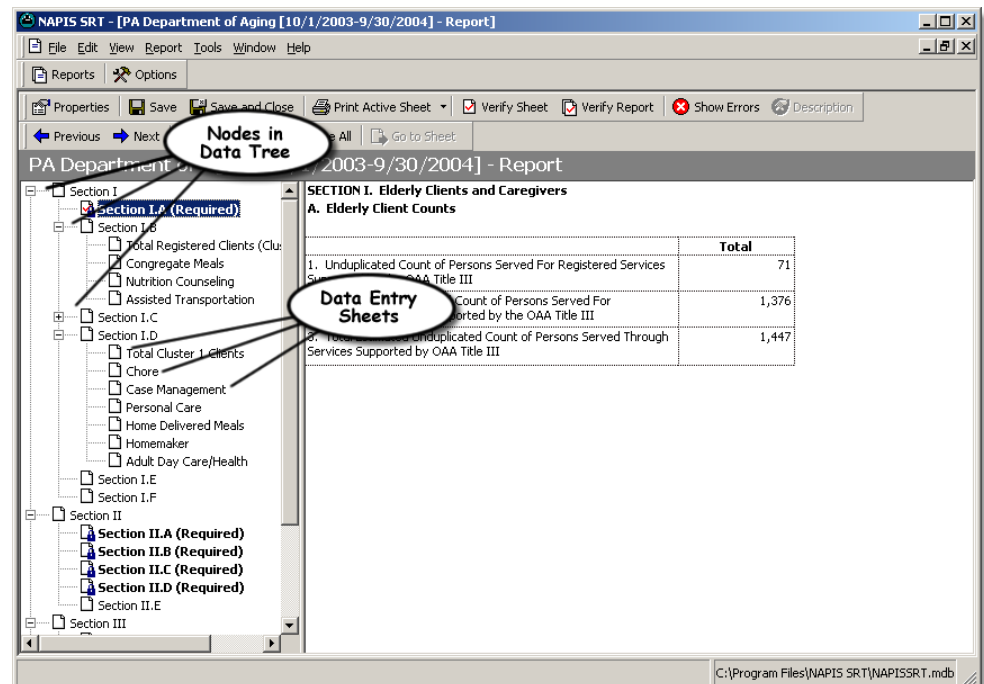

To see the data "tree", imagine the upper left most node as the "root," with the "branches" (other nodes) extending off and to the right of the "root."

To expand a node, use your mouse to click on the plus sign ⊞ located to the left of the node. Notice that the plus sign that was just expanded has been replaced by a minus sign ⊟ . To collapse the node, click on the minus sign.

Menus

The NAPIS SRT menus are located directly below the *NAPIS SRT* title bar. Menus give you access to all functions of the program. NAPIS SRT contains these menus: **File**, **Edit**, **View**, **Tools**, **Window**, and **Help**. Other menus, such as **Report**, appear as you access different areas of the program.
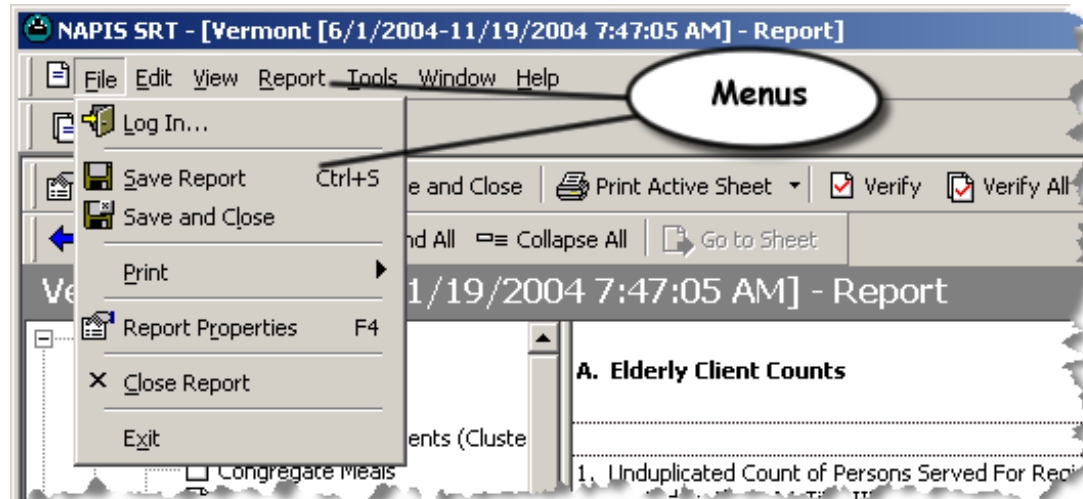
Toolbars

NAPIS SRT contains contextual *toolbars* that appear below the program *Menus*. A toolbar is a row of screen buttons that allow you to quickly access program functions.
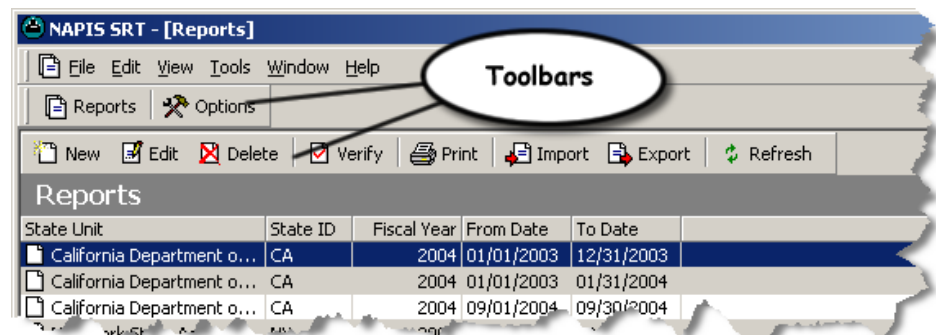
The buttons or icons that appear in the toolbars depend on the area currently open in NAPIS SRT. If you would like more information about a button in the toolbar, hover your mouse over the icon. After a few seconds, you will see the icon label appear in a yellow box.

Keyboard Shortcuts

NAPIS SRT offers several ways to use the keyboard instead of the mouse.

Moving Between Fields

Use the UP ARROW and DOWN ARROW on the keyboard to move between fields. The ENTER key moves you to the next field.

Shortcut/CTRL Keys

Some frequently used NAPIS SRT menu options have shortcut keys, which are displayed to the right of the option. These shortcut keys can be used to access a function without having to open a menu. For instance, under the **File** menu, the **Save** option shows the shortcut key "CTRL+S." To save without using the mouse, hold down the CTRL key while pressing "S."

ALT Keys

All menus and option buttons in NAPIS SRT have labels with one letter underlined. If the ALT key is pressed in combination with the underlined letter, the effect is the same as clicking on the menu or button with the mouse. For example, the **File** menu can be opened by holding down the ALT key while typing an "F." Use ESC for **Cancel** and **Close**.

List or Grid Screens

NAPIS SRT displays program reports in a *List Screen*. *List Screens,* also known as *Grids,* display several records in a list, similar to a spreadsheet. Each row contains one record. Columns divide each row, listing key information about each record. To open the record, double click on the row of the entry.

Sorting Information

You can sort the records in a list screen by clicking the column headings. Click once on the appropriate column heading. The records will sort themselves by the data that appears in the column. The program will sort in ascending order by default. Click one more time on the same column heading to sort the information in descending order.

Refreshing List Screens

Most list screens have a **Refresh** button. As you add or edit records, the records displayed by a list screen may not reflect the most recent changes to the database. When you click **Refresh**, NAPIS SRT will update the list screen with current data.

Customizing List Screens

NAPIS SRT also gives you options to customize the columns displayed on the screen - see *Formatting Columns* (on page 20) for more information.

Formatting Columns

NAPIS SRT allows you to format the columns of the *Report list (grid) screen*. You can change the size and number of columns in view, the sort order of the data, and the order of the columns themselves.

➢ *To adjust column widths*

1 Hover the mouse over the right border of a column heading.

2 When the pointer becomes a double-headed arrow, click and hold down the mouse button.

3 Drag the column border to the left or right.

4   Let go of the mouse button.

➢ *To adjust the column to fit the column contents*

1   Double-click the right border of the column heading.

Changing the Column Order

➢ *To change the column order of a list screen*

1   In a list screen, click on the title of a column you need to move. Hold the mouse button down.

2   Move the mouse left or right as needed.   NAPIS SRT will display a grey line, showing you where the column will appear.

3   Let go of the mouse button. The column should appear in the new location.

------------------------------ OR ------------------------------

1   In the list screen, right-click (use the alternate mouse button).

2   In the menu that appears, select **Format Columns...**.

-OR- From the **View** menu, choose **Format Columns...**.
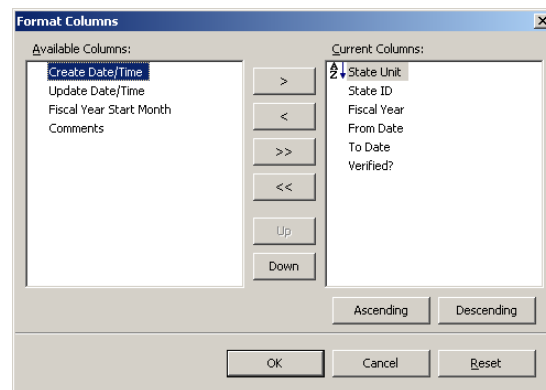
3   In the *Format Columns* screen, highlight the column you wish to move in the *Current Columns* box.

4   Click the **Up** or **Down** buttons as needed. The top of the list corresponds to the left side of the screen.

5   Click **OK**.

Add or Remove Columns from View

➢ *To add or remove a column from a list screen*

1 In the list screen, right-click (click with the alternate mouse button).

2 In the menu that appears, select **Format Columns...**.

-OR- From the **View** menu, select **Format Columns....**

3 In the *Format Columns* screen, highlight the column you wish to have appear in the *Available Columns* box. If you wish to remove columns from view, highlight one or more columns in the *Current Columns* box.
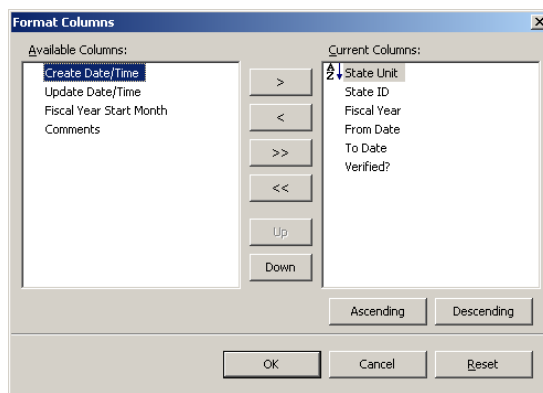
4 Click on the right arrow if you are adding a column. Click on the left arrow if you are removing a column. The double arrows will add (right) or remove (left) all columns.

5 Click **OK**.

Changing List Screen Sort Order

You can easily change the order of the data that appears on a list screen.

➢ *To change the sorting of a list screen*

1 Click once on the appropriate column heading. Examples: *State Unit*, *Fiscal Year*. The records will sort themselves in ascending order by the data in the column.

2 Click one more time on the same column heading to sort the information in descending order.

Exiting NAPIS SRT

➢ *To exit NAPIS SRT*

1   From the **File** menu, choose **Exit**.

-------------------------------- OR ---------------------------------

1   Click on the **X** in the upper right most corner.

-------------------------------- OR ---------------------------------

1   ALT+F+X

Using NAPIS SRT

Using NAPIS SRT outlines the individual procedures used to create a transmission file. The checklist below describes the general process you will go through to get your data ready for transmission.

NAPIS SRT Checklist

1 *Import an XML or DBF file* (see "Importing Reports" on page 40) or spend time *Creating a New SPR* (on page 26).

2 *Edit the SPR* (see "Editing Reports" on page 28) as needed to clean up data.

3 Verify the data - *sheet by sheet* (see "Verifying a Sheet" on page 34) or *the whole report* (see "Correcting Errors" on page 38).

4 *Correct any errors* (see "Correcting Errors" on page 38) that the program has found. NAPIS SRT offers several error correction features, including the ability to *print parts or all of the SPR.* (see "Printing Reports" on page 47)

5 *Re-verify the report* (see "Verifying a Report" on page 35).

6 *Export the report* (see "Exporting a Signed (Verified) Report" on page 45) to create a signed file (package) ready for transmission.
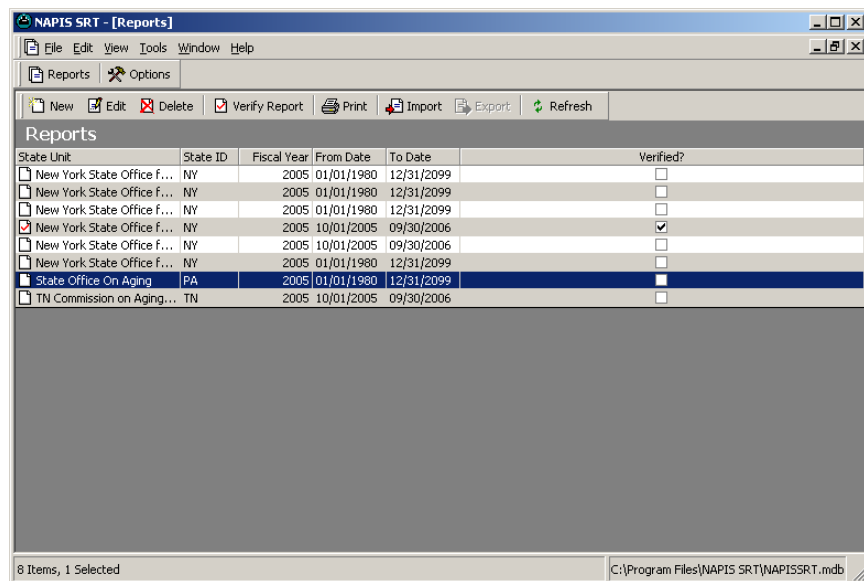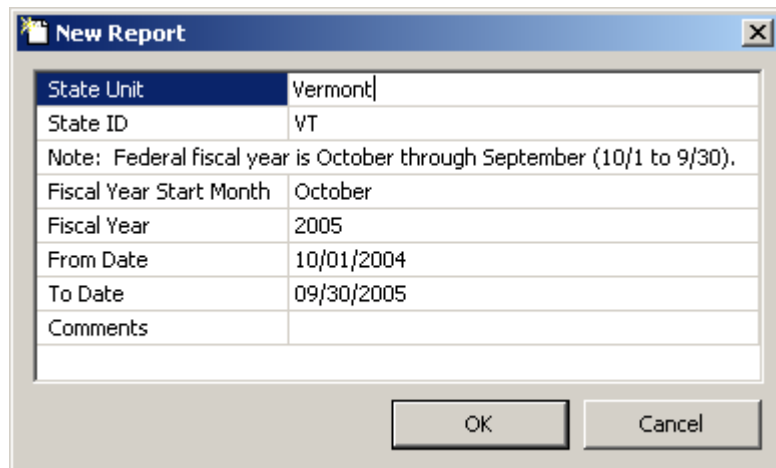
Creating a New SPR

If you *import from XML or DBF files* (see "Importing Reports" on page 40), NAPIS SRT creates the new SPRs automatically.

➢ *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.

3   Enter the name of your *State'*s *Unit*. Select your state's abbreviation under *State ID*.

New Report	
State Unit	Vermont
State ID	VT
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	

4   Enter the *Fiscal Year Start Month*, *Fiscal Year*, the *From* and *To Date* of the report and any *Comments*. You can view any of these items later on through **Properties** *in the* *Report Data Entry screen* (see "Deleting Reports" on page 40).

5   Click **OK**.

6   NAPIS SRT will bring you to the *Report Data Entry* screen.

7   Begin data entry as outlined in Report Data Entry.

8   As you work, click **Save** 🖫 periodically. Click **Save and Close** 🖫 to close the report.
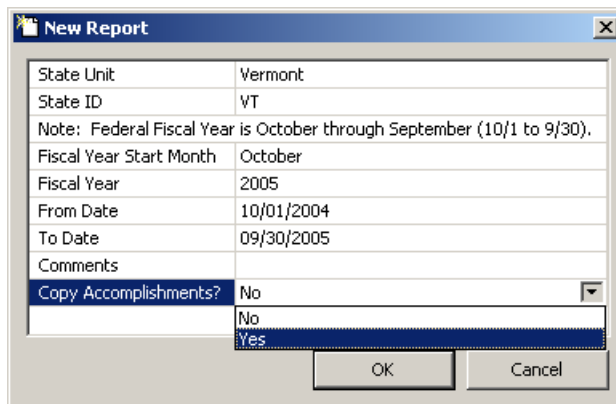
The *From* and *To* dates need to be 10/01 and 09/30 , matching the Federal fiscal year, to create a Verified report.

Copying Report Accomplishments

NAPIS SRT can copy Developmental Accomplishments in Sections IV.A and IV.B from an existing report into a new one.

➢ *To copy report accomplishments from an existing report*

1 Click **Reports** on the toolbar.

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

2 Highlight the report you wish to copy accomplishments from.

3 Click **New** on the toolbar.

4 Enter the name of the *State Unit*. Select your state's abbreviation under *State ID*.

New Report		
State Unit	Vermont	
State ID	VT	
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	
	No	
	Yes	

5 Enter the *Fiscal Year Start Month*, *Fiscal Year*, the *From* and *To Date* of the report and any *Comments*. You can view any of these items later on through **Properties** *in the Report Data Entry screen* (see "Deleting Reports" on page 40).

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

6 Select **Yes** in *Copy Accomplishments?*

7 Click **OK**.

8 NAPIS SRT will bring you to the *Report Data Entry* screen.

9 Begin data entry as outlined in Report Data Entry.

10 As you work, click **Save** periodically. Click **Save and Close** to close the report.

Editing Reports

If you edit a report that has been *Verified*, you'll need to *re-verify the report* (see "Verifying a Report" on page 35) after saving your changes.

➢ *To edit an existing report*

1   Click **Reports** on the toolbar.

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

2   Highlight a report you want to edit.

3   Click **Edit** on the toolbar.

4   NAPIS SRT will bring you to the *Report Data Entry* screen.

5   Begin data entry as outlined in Report Data Entry.

6   As you work, click **Save** periodically. Click **Save and Close** to close the report.

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 ⊞ 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,* (see "Verifying Data" on page 33) 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, highlight the error and click **Description** on the toolbar.

Moving through a Report

The SPR has many sections and subsections. NAPIS SRT offers multiple tools to move through an SPR as efficiently as possible.

Navigation Toolbar

NAPIS SRT displays the **Navigation** toolbar just above the **Navigation** and **Work** panes in the **Report Data Entry** screen.
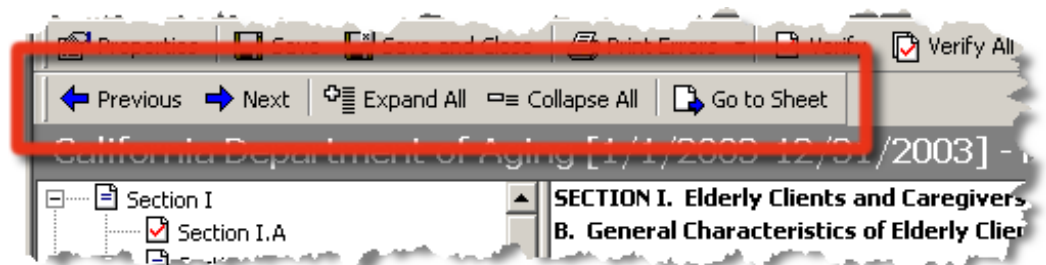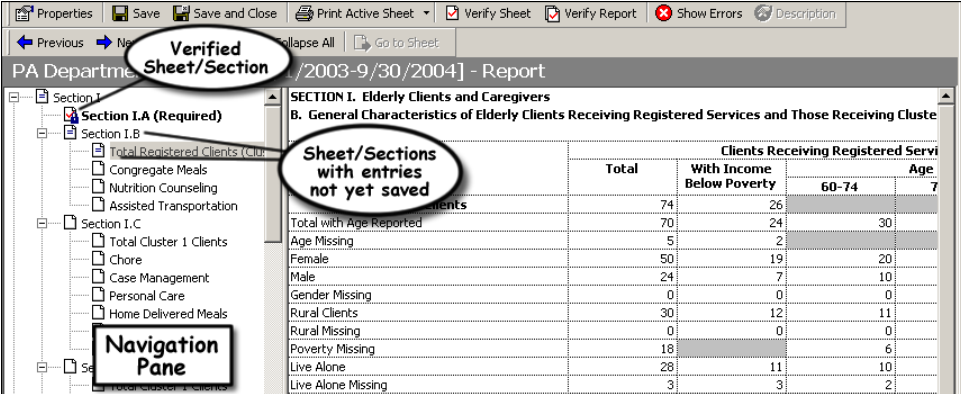
From left to right, here are the functions of the **_Navigation_** toolbar:

- Previous - goes to the previous sheet in the section.
- Next - goes to the next sheet in the section.
- Expand All - expands all sections so you can see all sheets.
- Collapse All - display just the sections in the **_Navigation_** pane.
- Go To Sheet - highlight an error and go to the appropriate sheet causing the error. (Works only after you've tried to *verify data.* (see "Verifying Data" on page 33))

Tips for using the _Navigation_ **pane**

- Click on the plus signs ⊞ to expand **_Section Headings_** to see data entry sheets.
- When you enter data into a sheet, you will see that the sheet and section icons have changed to indicate you've made unsaved changes.
- After a sheet has been successfully verified the sheet icon will change to a checked icon. After all the sheets in a section have been verified, the section icon will also change to a checked icon.


After **_verifying the data_** (see "Verifying Data" on page 33), 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, highlight the error and click **Description** on the toolbar.

Entering Data into Cells

➢ *To modify numbers or data within a sheet*

1 *After creating a new report* (see "Creating a New SPR" on page 26) or *accessing an existing report* (see "Editing Reports" on page 28), find the appropriate section and sheet with the cell you need to enter or modify.

2   The screen defaults to showing you the sheet in the first section. Use the plus sign ⊞ to expand section headings to see sheets in the *Navigation* pane. Highlight the appropriate sheet.

3   The sheet of the section will appear in the *Work* pane to the right.

4   Click in a cell. Enter or modify information as needed. Press ENTER or use the RIGHT ARROW to continue moving through the cells.

5   When finished, click **Save** 🖫 or to exit the report, click **Save and Close.** 🖫

Verifying Data

Before your exported data package can be transmitted to the AoA, it must be *Verified*. The verification process checks to make sure that a series of rules about the data in the report have been followed.

NAPIS SRT verifies data at three levels: cell level, sheet, and report level.

Cell Level Verification

Cell level verification works differently than sheet and report level verification. Cell level verification automatically checks to make sure that the data matches the rules as you make changes to each cell. Sheet and report level verification require you to make changes and tell NAPIS SRT you are ready for verification by clicking a button. You can turn cell level verification on and off - see Customizing Verify Options for more details. By default, cell level verification is turned off.

It makes sense to turn off cell level verification as you enter data. If you are starting with a fresh report, entering data into the first cell will cause errors with all the rest of the cells in each sheet. Cell level verification is a great tool to help you clean up an existing report to prepare it for final verification, signature, and export.

Sheet Level Verification

Sheet level verification allows you to verify just the current sheet in the *Report Data Entry* screen. To use, navigate to a particular sheet in an SPR.

Once you see the sheet in the *Work* pane, click **Verify Sheet**.   NAPIS SRT will verify the current sheet and let you know of any errors. See *Verifying a Sheet* (on page 34) for detailed instructions.
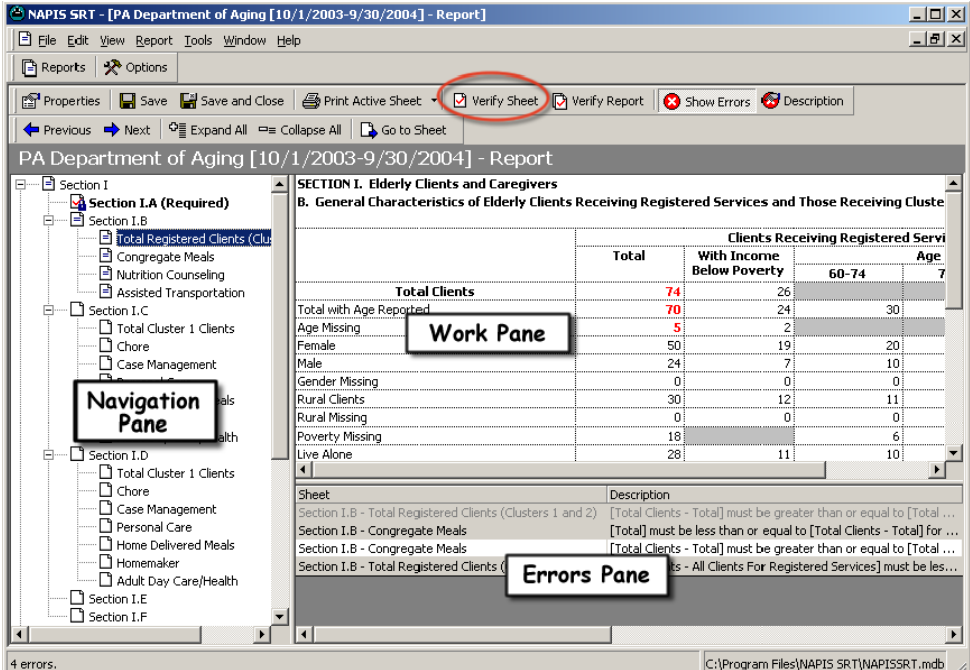
Report Level Verification

An SPR will need to pass *Report Level* verification before receiving a signature for the AoA. To verify a report, highlight it on the *Reports* list screen and click **Verify Report**. NAPIS SRT will check all the data in the report. For more details on report verification, please see *Verifying a Report* (on page 35).

Verifying a Sheet

When you verify a sheet within an SPR, an *Error* pane will appear in the lower right of the screen. Numbers in any cells related to the errors will change color. You can customize the colors that NAPIS SRT uses for error cells. See Customizing Verify Options for more details.

➢ *To verify a sheet within an SPR*

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

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

2   Highlight the report you need to edit and verify.

3   Click **Edit** 🗗 on the toolbar.

4   Navigate to the the appropriate sheet in the *Navigation* pane.

5   Highlight the sheet so that NAPIS SRT displays it in the *Work* pane.

6   Click **Verify Sheet** 🗗 on the toolbar.

7   NAPIS SRT will show any errors in the *Errors* pane displayed below the *Work* pane. Click **Show Errors** 🔴 on the toolbar to bring the *Errors* pane in and out of view.

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* (on page 38) for more information.

8 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.

9 If the sheet was successfully verified, you will see a check on the appropriate sheet in the *Navigation* pane.

Verifying a Report

Even if you have verified each sheet within an SPR, you will still need to verify the whole report to *export it to a file* (see "Exporting Reports" on page 43) ready for transmission. If you have not yet entered data into certain parts of the report, *Verify* will skip over non-required sections with all zeros.

When you verify an SPR with errors, an *Error* pane will appear in the lower right of the screen. Numbers in any cells related to the errors will change color. You can customize the colors that NAPIS SRT uses for error cells. See *Changing Report Colors* (on page 55) for more information.

Required Sections for Report Verification

All sections listed below must have values (non-zero) and be error free before NAPIS SRT can export the SPR to an SRT file ready for transmission.

- I.A
- II.A
- II.B
- II.C
- II.D
- III.A
- III.B
- III.C
- III.D

➢ *To verify a report for signature*

1 Click **Reports** on the toolbar.

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

2 Highlight the report you want to verify.

3 Click **Verify Report** on the toolbar.

4   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.
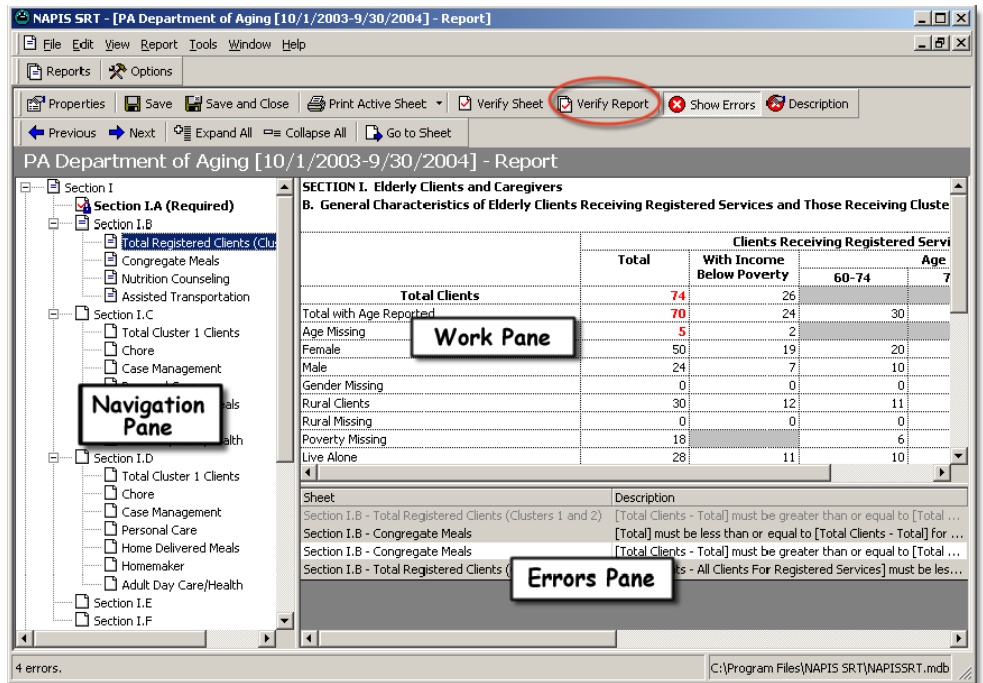
5   NAPIS SRT will show any errors in the *Errors* pane displayed below the *Work* pane. Click **Show Errors** on the toolbar to bring the *Errors* pane in and out of view.

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* (on page 38) for more information.

6   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.

▪   To find an error listed in the *Error* pane, highlight the error. Click **Go to Sheet** .   Please see *Correcting Errors* (on page 38) for more tips on correcting problems that NAPIS SRT finds.

1   If the report was successfully verified, the program will prompt you. Click **OK** at the prompt. Click **Save and Close** to save and close the verified report.
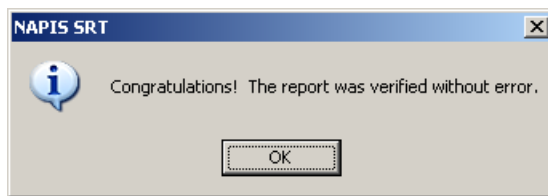
----------------------------------- OR ---

➢ *To verify a report from within the Report Data Entry screen*

1   Click **Reports** on the toolbar.

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

2   Highlight the report you need to edit and verify.

3   Click **Edit** on the toolbar.

4   On the *Report Data Entry* screen, click **Verify Report** on the toolbar.

5   NAPIS SRT will show any errors in the *Errors* pane displayed below the
Work pane. Click **Show Errors** on the toolbar to bring the *Errors*
pane in and out of view.

6   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.

7   To find an error listed in the *Error* pane, highlight the error. Click **Go to
Sheet** . Please see *Correcting Errors* (on page 38) for more tips on
correcting problems that NAPIS SRT finds.

8   If the report was successfully verified, the program will prompt you.
Click **OK** at the prompt. Click **Save and Close** to save and close the
verified report.

Correcting Errors

After verifying a report or sheet, you will probably see a list of errors that NAPIS SRT has found. In a report as complex as the SPR, it can be difficult to find which piece or pieces of data are causing the problems. Try these ideas to help resolve report errors:

- You can print out the errors in the *Error* pane, if it makes it easier for you to read. When the *Error* pane is in view, go to the **File** menu and select **Print** and then **Print Errors...**.

- Use the *Error* pane to easily shift to the sheets that are causing problems. Highlight an error and either double-click or click **Go To Sheet** on the toolbar to go to the appropriate sheet.

- If it's not easy for you to see which cells are causing problems, try changing the color of the error cells. See Customizing Verify Options for details.

- Turn on *cell level verification* (see "Verifying Data" on page 33). Cell level verification automatically checks for errors as you enter data. Cell level verification can be helpful if you want to see how changing one cell will affect other data throughout the report. See Customizing Verify Options for information on how to turn on and off cell level verification.

- If you choose to use cell level verification, you can also have the program beep whenever you enter a value that causes an error. Please refer to Customizing Verify Options for details.

- Try printing or exporting a sheet to see the data in a different format. See *Printing a Sheet* (on page 48) and *Exporting a Sheet* (on page 44) for more information.

Printing Errors

You can print the list of errors found in the *Errors* pane.

➢ *To print a list of errors*

1   Click **Reports** on the toolbar.

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

2   Highlight the report you need to edit and verify.

3   Click **Verify Sheet** -OR- **Verify Report** .

4   NAPIS SRT displays all problems found in the *Errors* pane.

5   Click on the down arrow next to the **Print Active Sheet** button. Select **Print Errors**.

-OR- From the **File** menu, select **Print** and then **Print Errors...**.

6   Click **OK** to print.

Error List Sample

NAPIS SRT Error List

Section II.A

☐ For row items 1, 2, 3, 4, 5, 6, 7, 8, and 9 the columns [Number of Providers], [Unduplicated Persons Served], [Service Units] and [Title III Expenditure] cannot be zero if any of the other three columns is greater than zero.

☐ For row items 1, 2, 3, 4, 5, 6, 7, 8, and 9 the columns [Number of Providers], [Unduplicated Persons Served], [Service Units] and [Title III Expenditure] cannot be zero if any of the other three columns is greater than zero.

☐ For row items 10, 11, 12, 13, & 14 [Number of Providers], [Service Units] and [Title III Service Expenditure] cannot be zero if any of the other two columns is greater than 0.

☐ For row items 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15 & Total (Unduplicated) [Title III Expenditure] must be greater than or equal to [OAA Title III Expenditures ($) by Part - B] + [OAA Title III Expenditures ($) by Part - C1] + [OAA Title III Expenditures ($) by Part - C2] + [OAA Title III Expenditures ($) by Part - D].

☐ For row items 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15 & Total (Unduplicated) [Title III Expenditure] must be greater than or equal to [OAA Title III Expenditures ($) by Part - B] + [OAA Title III Expenditures ($) by Part - C1] + [OAA Title III Expenditures ($) by Part - C2] + [OAA Title III Expenditures ($) by Part - D].

☐ For row items 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15 & Total (Unduplicated) [Title III Expenditure] must be greater than or equal to [OAA Title III Expenditures ($) by Part - B] + [OAA Title III Expenditures ($) by Part - C1] + [OAA Title III Expenditures ($) by Part - C2] + [OAA Title III Expenditures ($) by Part - D].

                                                Number of Errors in Sheet: 6

Section II.E

☐ For all row items for which a service was reported [Total Service Expenditure], [Estimated Unduplicated Persons Served] and [Estimated Service Units] must be greater than zero.

☐ For all row items for which a service was reported [Total Service Expenditure], [Estimated Unduplicated Persons Served] and [Estimated Service Units] must be greater than zero.

☐ For all row items for which a service was reported [Total Service Expenditure], [Estimated Unduplicated Persons Served] and [Estimated Service Units] must be greater than zero.

☐ For all row items for which a service was reported [Total Service Expenditure], [Estimated Unduplicated Persons Served] and [Estimated Service Units] must be greater than zero.

                                                Number of Errors in Sheet: 4

                                                Total Errors in Report: 10

10/26/2005 2:07:46PM   Page 1 of 1

Viewing Report Properties

➢ *To view the properties of a report*

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

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

2   Highlight the report you wish to view.

3   Click **Edit** ⧉ on the toolbar.

4   Click on **Properties** ⧉.

-OR- From the **File** menu, select **Report Properties**. -OR- F4

5   When finished viewing report properties, click **OK**.

Deleting Reports

➢ *To remove a report from NAPIS SRT*

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

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

2   Highlight the report you wish to delete.

3   Click **Delete** 🗷 on the toolbar.

-OR- Select **Delete Report** from the **Edit** menu.

4   At the prompt, click **Yes** to continue or **No** to cancel.

Importing Reports

NAPIS SRT can import SPRs from properly formatted XML and DBF files. Schemas for XML and DBF files can be found through the AoA's website: http://www.aoa.gov/prof/agingnet/napis/napis.asp

You can also import from more than one file at a time. Click **Browse...** in step 5 to import SPRs from additional files.

➢ *To import SPRs into NAPIS SRT*

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 file
you wish to import. The file must be a DBF or an XML file. (reports.dbf
or *.xml)
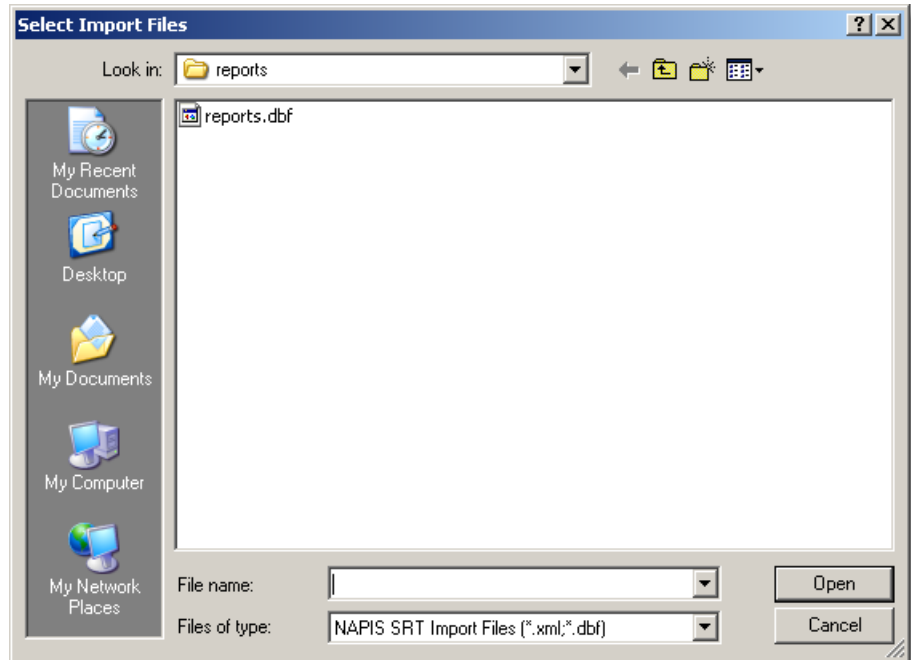
4   Click **Open**.
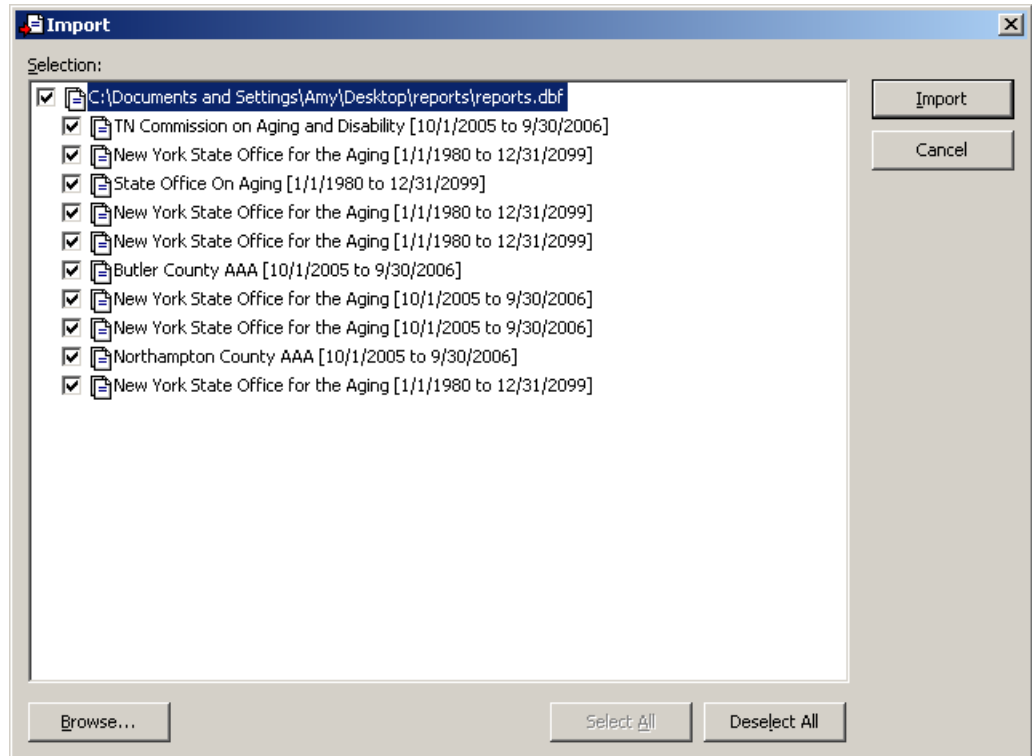
5   In the *Import* screen, check the reports you want to import. Click
Browse... to select SPRs from more than one import file. Use **Select All** to
check all files and reports. **Deselect All** removes all checks.

6   Click **Import** to bring all checked reports into NAPIS SRT.

7   Click **OK** at the prompt.

Exporting Reports

NAPIS SRT offers two types of exports: a full report export that creates files suitable for transmission to the AoA and a sheet export for use in troubleshooting reports.

The sheet export allows you to export one sheet at a time into a variety of different formats. Use the sheet export to take data from the report and pull it into other applications.

The export creates a signed file ready for transmission to the AoA. A *report must be verified* (see "Verifying a Report" on page 35) before you can export it from NAPIS SRT.
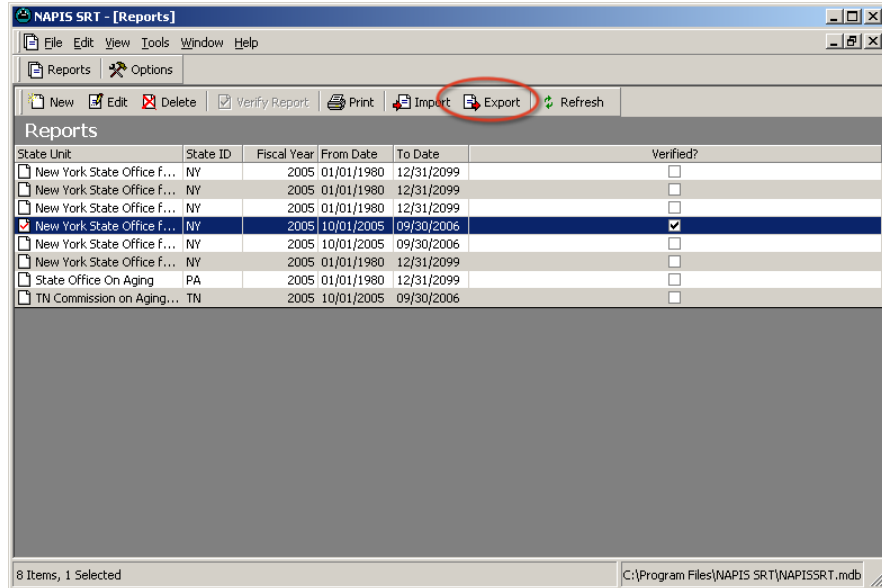
Exporting a Sheet

NAPIS SRT's printing mechanism exports individual sheets of a program report. If you need to export more than one sheet, repeat the procedure below from step 4.

Use the export to pull information into Microsoft Excel® and other third party programs. Files created using the sheet export cannot be imported by NAPIS SRT.

Export Options

Here's a list of some of the more frequently used export options offered by NAPIS SRT:

- Acrobat Format (PDF) - PDFs are a read-only forma and typically opened with Acrobat Reader.
- Crystal Reports (RPT) - report format used by Crystal Reports®, a common report writing software package.
- HTML 3.2 - HyperText Markup Language - this is the file format most commonly used by web sites.
- HTML 4.0 - a newer version of the HTML standard - see HTML 3.2
- MS Excel 97-2000 - output to an Excel spreadsheet including header information.
- MS Excel 97-2000 (Data only) - output only the data to an Excel spreadsheet.
- MS Word® - convert the sheet into a Microsoft Word document.
- Rich Text Format - convert the sheet into a word processing document that saves some formatting information. All most all word processors can open an RTF file.
- Separated Values (CSV) - or comma separated values - a text file where data is separated by commas. Most spreadsheet and database applications (such as Microsoft Access®) can import CSV files.
- Tab-separated text - another way of delineating data in a text file.
- XML - Extensible Markup Language - a text file where data is delineated with tags.

➢ *To export a sheet of a report*

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

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

2   Highlight the report you wish to export from.
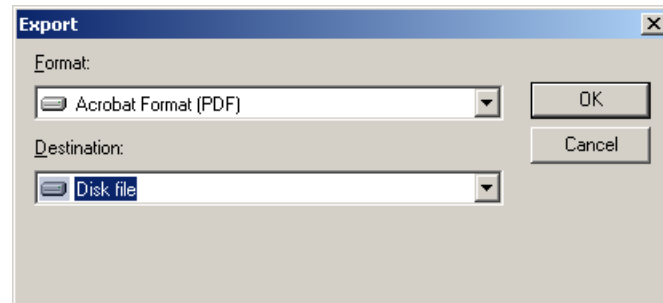
3   Click **Print** 🖨 on the toolbar.

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

4   Highlight the sheet you wish to export. Make sure it appears in the *Preview* pane to the right. The *Export* ignores any check marks in the left pane.

5   Click **Export Active Sheet** .

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

6   In *Export*, choose a **Format** and a **Destination**. If you are unsure of the *Destination*, choose *Disk file*. *Disk file* saves the export to a local or networked drive.

7   Click **OK**.

8   Click **OK** in *Export Options* to have NAPIS SRT finish the export.

Exporting a Signed (Verified) Report

NAPIS SRT can only export *verified SPRs* (see "Verifying Data" on page 33) to SRT files.

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

1   Click **Reports** on the toolbar.

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

2   Highlight the report you wish to export.

3   If the report is not yet verified, click the **Verify** icon on the toolbar. See *Verifying Data* (on page 33) for more details on the verification process and error correction.

4   If the report is verified, then click **Export** on the toolbar.

-OR- From the **Tools** menu, select **Export...**. -OR- CTRL+E
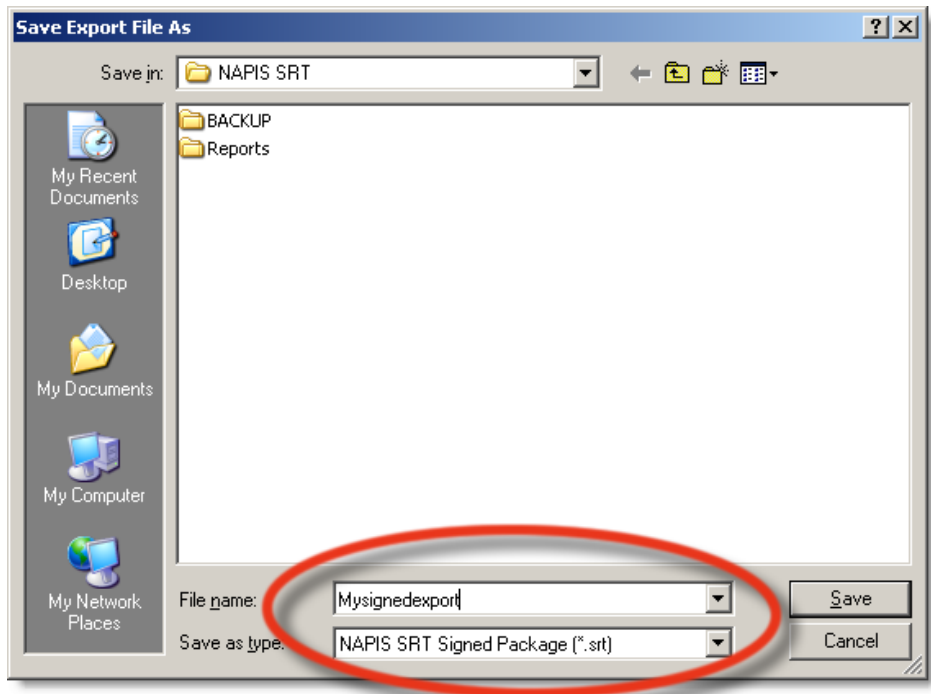
5 Navigate to the folder where you want to store the export.

6 Enter a *File name*.

7 Click **Save**.

8 NAPIS SRT will create a signed export file ending in ".srt".

9 Click **OK** when prompted.

Printing Reports

NAPIS SRT can print individual sheets from a report or the entire program report. When you click **Print** on the *Reports* list or while changing a program report, NAPIS SRT brings you to the *Print Preview* screen. *Print Preview* looks like the *Report Data Entry* screen and you'll use them in similar ways. Use the *Navigation* pane on the right to select which sheets you wish to print. The *Preview* pane allows you to view the sheet selected (highlighted) in the *Navigation* pane.
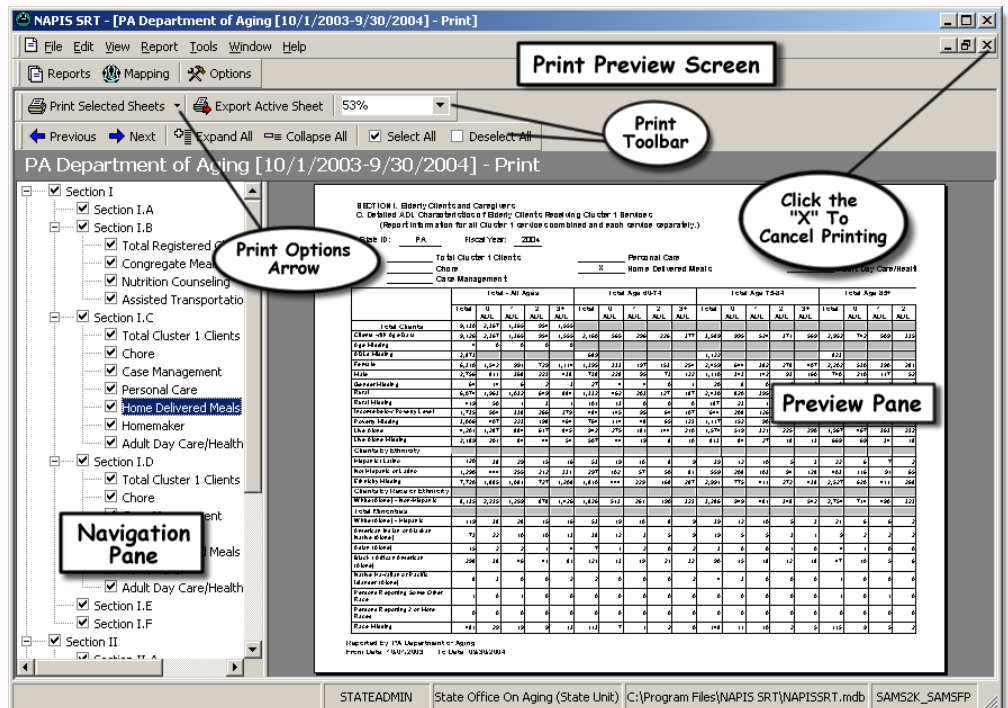
Print Toolbar

The *Print Toolbar* contains two rows of icons.

The top row:

- Print - to the left of **Print <options>** is a down arrow that gives you a menu with other printing options. Clicking the button or selecting from the menu actually sends the report to the printer.
- Export Active Sheet - export the sheet visible in the *Preview* pane. See *Exporting a Sheet* (on page 44) for details on how to use this option.
- Zoom - change the magnification of the sheet.

The bottom row:

- Previous - selects the previous sheet in the report and displays it in the *Preview* pane.
- Next - selects the next sheet in the report and displays it in the *Preview* pane.
- Expand All - view all sheets in the report under their respective section headings in the *Selection* pane.
- Collapse All - view only section headings in the *Selection* pane.
- Select All - select all sheets and sections. Places a check mark in every box.
- Deselect All - removes all checks or selections.

Printing a Sheet

➢ *To print out a single sheet from the Report Data Entry screen*

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

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

2   Highlight the report you wish to print out.

3   Click **Edit** 🖾 on the toolbar.

4   Highlight the sheet you want to print.

5   Click **Print Active Sheet** in the *Report Data Entry* screen.

6   Click **Print Selected Sheets** in the *Print Preview* screen. If you wish to cancel printing, click on the lower **X** in the upper right corner.

7   Select a printer. Change printing **Preferences** as needed.

8   Click **Print**.

----------------------------------- OR --

 ➢ *To print out a single sheet from the Reports list screen*

     1   Click **Reports** on the toolbar.

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

     2   Highlight the report you wish to print out.

     3   Click **Print** on the toolbar.

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

     4   Highlight the sheet you wish to print so it appears in the right *Preview* pane. If you wish to cancel printing, click on the lower **X** in the upper right corner.

     5   Click on the **Down** arrow to the right of the **Print <option>** button. Select **Print Active Sheet**. This is the equivalent of printing the "Current Page" in a program such as Microsoft Word®.

     6   Select a printer. Change printing **Preferences** as needed.

     7   Click **Print**.

Printing Selected Sheets

 ➢ *To print out select sheets from a report*

     1   Click **Reports** on the toolbar.
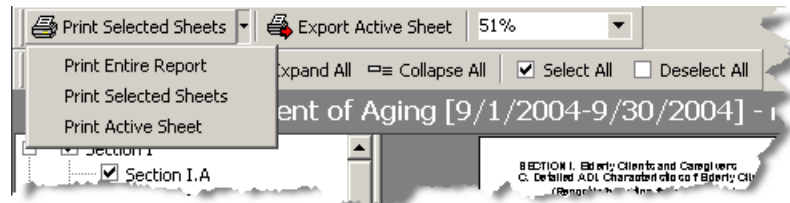
         -OR- Select **Reports** from the **View** menu. -OR- CTRL+R

     2   Highlight the report you wish to print out.

     3   Click **Print** on the toolbar.

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

     4   In the *Print Preview* screen, select which sheets or section of the report you'd like to print by checking the boxes.

     5   Click **Print Selected Sheets** on the toolbar. NAPIS SRT will print all the sheets checked in the right *Navigation* pane.

     6   Select a printer. Change printing **Preferences** as needed.

7 Click **Print**.

Report Sample

SECTION I. Elderly Clients and Caregivers
B. General Characteristics of Elderly Clients Receiving Registered Services and Those Receiving Cluster 2 Registered Services

State ID: PA   Fiscal Year: 2004

X Total Registered Clients   ____ Congregate Meals   ____ Nutrition Counseling   ____ Assisted Transportation
(Cluster 1 and Cluster 2)

	Clients Receiving Registered Services				
	Total	With Income Below Poverty	Age of Client		
			60-74	75-84	85+
Total Clients	32,947	4,468			
Total with Age Reported	32,909	4,466	9,924	13,757	8,087
Age Missing	38	2			
Female	22,451	3,302	6,567	9,281	5,825
Male	10,221	1,150	3,245	4,383	2,228
Gender Missing	275	16	112	93	34
Rural Clients	23,138	3,676	6,891	9,770	5,828
Rural Missing	2,780	52	1,000	1,252	415
Poverty Missing	11,548		3,673	4,706	2,538
Live Alone	11,587	2,719	2,833	4,896	3,577
Live Alone Missing	11,032	602	3,248	4,579	2,689
Clients by Ethnicity					
Hispanic / Latino	239	70	104	87	35
Not Hispanic or Latino	3,169	656	870	1,362	812
Ethnicity Missing	29,539	3,742	8,950	12,308	7,240
Clients by Race or Ethnicity					
White (Alone) - Non-Hispanic	29,863	4,175	8,719	12,714	7,546
Total Minorities					
White (Alone) - Hispanic	236	68	104	86	33
American Indian or Alaskan Native (Alone)	178	53	94	50	19
Asian (Alone)	98	15	66	19	9
Black / African American (Alone)	674	112	261	238	109
Native Hawaiian or Other Pacific Islander (Alone)	13	1	4	6	2
Persons Reporting Some Other Race	2	1	0	1	1
Persons Reporting 2 or More Races	0	0	0	0	0
Race Missing	1,883	43	676	643	368

Reported by: PA Department of Aging
From Date: 10/01/2003   To Date: 09/30/2004

Printing an Entire Report

➢ *To print out an entire report*
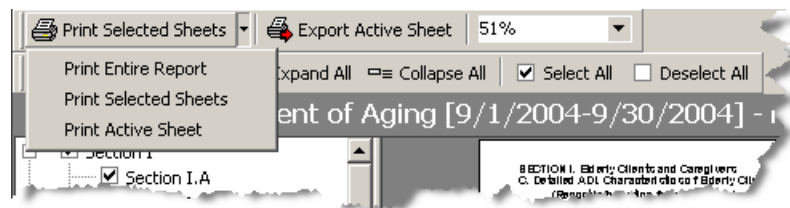
1 Click **Reports** [icon] on the toolbar.

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

2 Highlight the report you wish to print out.

3 Click **Print** [icon] on the toolbar.

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

4   To print the entire report, click on the **Down** arrow to the right of the **Print <options>** button. Select **Print Entire Report**.

5   Select a printer. Change printing **Preferences** as needed.

6   Click **Print**.

Administering NAPIS SRT

Administering NAPIS SRT discusses how to do a simple backup of the NAPIS SRT database and how to change program options.

Simple Backup

Regular backups of the NAPIS SRT database are crucial to a swift recovery in the event of a major electrical disruption or other disaster. This section includes instructions for a simple backup, but Synergy Software recommends that backups be done to removable media such as tape drives. Please consult your system administrator for information about your organization's backup procedures.

The files containing the NAPIS SRT data (usually NAPISSRT.mdb and NAPISSRT.mdw) will need to be backed up at the end of each workday when the software is in use. A typical rotation schedule for backup includes 6 media - one for each weekday and two for Fridays. The Friday media is taken off-site and the older backup is returned on Monday. Your backup needs may vary based on how often you use NAPIS SRT and your security procedures. Please consult your system administrator if you need further recommendations on backup based on your individual needs and available equipment.

Please note that NAPIS SRT stores service maps with the appropriate SAMS database. Backups of the SAMS database will also backup the service map.

➢ **To do a simple backup of NAPIS SRT**

1 From **Start** in the Windows® Task Bar, select **Programs** (or **All Programs**), the **Accessories** folder and then **Windows Explorer**.

2 Find the database files named in the NAPIS SRT *Log In* screen. In a local install, the file is usually located in C:\Program Files\NAPIS SRT.

3 Copy the NAPIS SRT database files, usually named NAPISSRT.mdb and NAPISSRT.mdw, to a different computer or hard drive.

Customizing Verify Options

By default, NAPIS SRT's cell level verification is turned off. Use the procedure outlined below to change cell verification settings. You can also have NAPIS SRT produce a sound when it finds an error. See *Verifying Data* (on page 33) for more information about NAPIS SRT's verification features.

➢ *To change NAPIS SRT's verification options*

1   Click **Options** on the toolbar.

-OR- From the **Tools** menu, select **Options**.
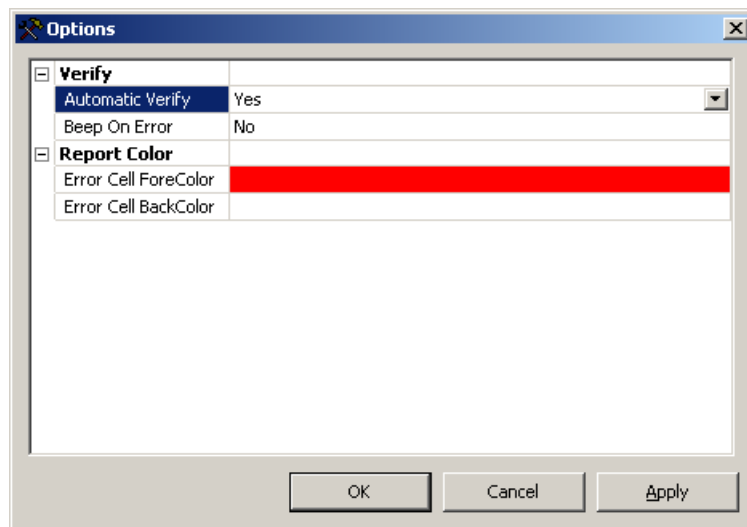
2   When *Automatic Verify* under the *Verify* heading is set to **Yes**, NAPIS SRT will check any changes made on each cell or field on the report against the rest of the report for errors. This feature is useful for getting rid of the last few errors in a report, but you may find it in the way when initially importing or creating a report. Select **No** in *Automatic Verify* to prevent the program from doing any verification until you click *Verify*.

3   To have NAPIS SRT produce a sound when an error is found, select **Yes** in *Beep On Error*. To make the program silent upon finding an error, select **No**.

4   When finished making changes, click **OK**.

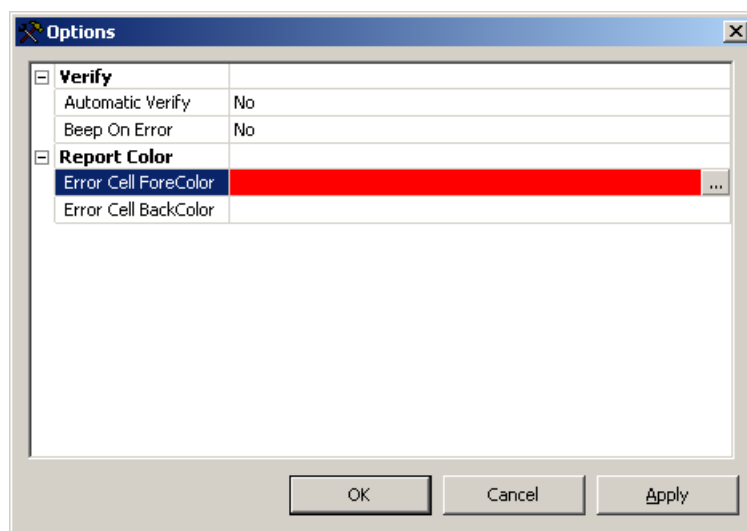# Changing Report Colors

You can customize the colors NAPIS SRT displays on program reports for *data verification* (see "Verifying Data" on page 33).

➢ *To change the colors displayed on a program report*

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

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

2   Under the *Report Color* heading, choose an *Error Cell ForeColor* and an *Error Cell BackColor*. The *ForeColor* is the color of the text in the cell. The *BackColor* is the cell background color.

3   To choose a color, click on the box to the right of *Error Cell ForeColor* or *Error Cell BackColor*.

4   Click the **Browse** ⊡ button.

5   Select a color.

6   Click **OK** to close the *Color* screen.

7   When you are finished making changes, click **OK** to close the *Options* screen.

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.

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