CSAT GPRA Government Performance and Results Act

Data Entry and Reporting System

System User's Guide

Module 3 – Knowledge Application Programs

Version Issue: Version 1.2
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Table of Contents

Page

List of Figures

List of Figures (continued)

List of Figures (continued)

Module 3 – Entering/Viewing/Editing Data for Knowledge Application (KA) Programs

This module contains information and procedures for entering Knowledge Application (KA) data into the Data Entry and Reports System. This User's Guide does not contain the instructions for completing the KA forms. You can access these instructions under the Data Collection Tools and Instruments, KA Program Section, of the public GPRA Web site.

Upon completing this module you will be able to:

- Select a program
- Change a program target
- Add a new meeting code
- Enter a new meeting follow-up survey
- View or edit an existing meeting baseline or follow-up meeting survey record
- Enter a new training baseline survey
- Enter a new follow-up training survey
- View or edit an. existing training baseline or follow-up survey record
- Enter a new technical assistance baseline survey
- Enter a new technical assistance follow-up survey
- View or edit an existing technical assistance baseline or follow-up survey record
- View or edit an existing baseline or follow-up technical assistance survey
- Add a new products/materials survey record.

Selecting a Program

If you manage both Target Capacity Expansion and Knowledge Application (KA) program grants, you will be automatically directed to the **DATA ENTRY PROGRAM SELECTION** page to choose the type of program for which you wish to enter data in this session. If you manage only KA grants, the System will skip the **DATA ENTRY PROGRAM SELECTION** page and automatically display the **DATA ENTRY MAIN MENU – KA TOOLS** page

Click the type of program you wish to access. If you manage more then one grant, the **GRANTEE SELECTION** page displays. If you manage a single grant, the **DATA ENTRY MAIN MENU – KA TOOLS** page displays**.**

Figure 3-1 – Data Entry Program Selection Page (1 program)

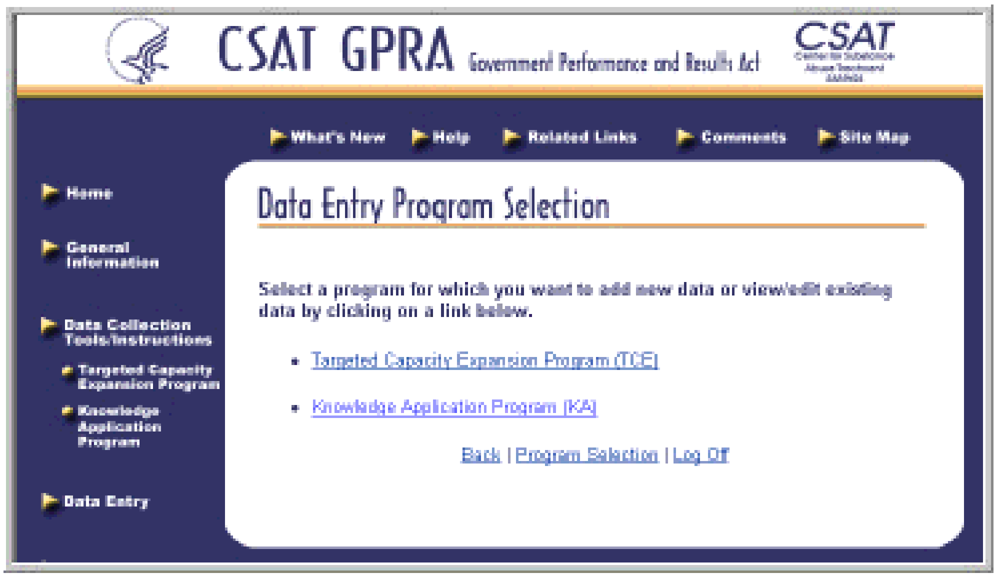


Figure 3-2 – Data Entry Program Selection Page (2 programs)

Changing a Program Target

The user may have one of two reasons for changing a program target. Either the target was entered into the System incorrectly, or the user believes the target must be changed.

The program targets are taken from the grant application, and they are not always straightforward. For this reason, the CSAT-GPRA Web Support must have authorization from the GPO to change a program target.

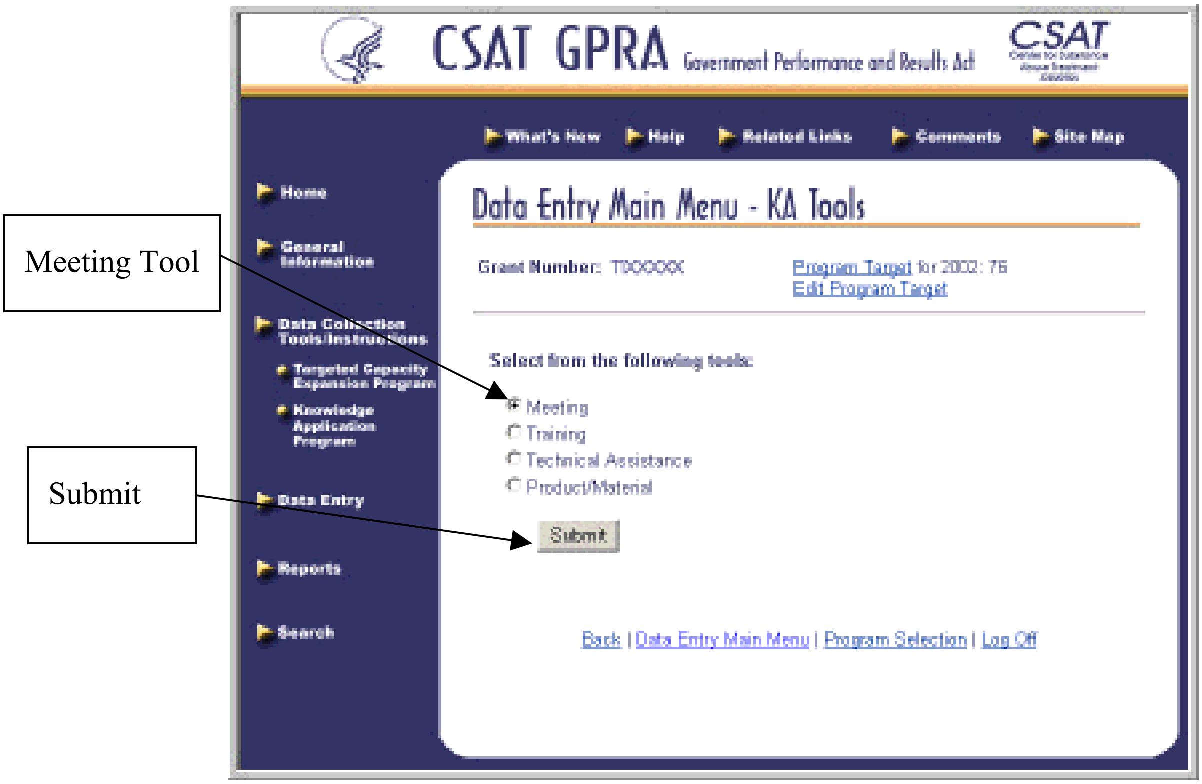
If you have entered the program target incorrectly, you may notify the Web Master and the CSAT-GPRA Web Support will be able to change the program target information.

Alternatively, you may contact your GPO and ask that the program target information be changed. The GPO will then contact the CSAT-GPRA Web Support to have the target information changed.

Adding a New Meeting Code

To enter a new meeting code, go to the **DATA ENTRY MAIN MENU – KA TOOLS** page, and complete the following steps.

Figure 3-3 – Data Entry Main Menu – KA Tools Page

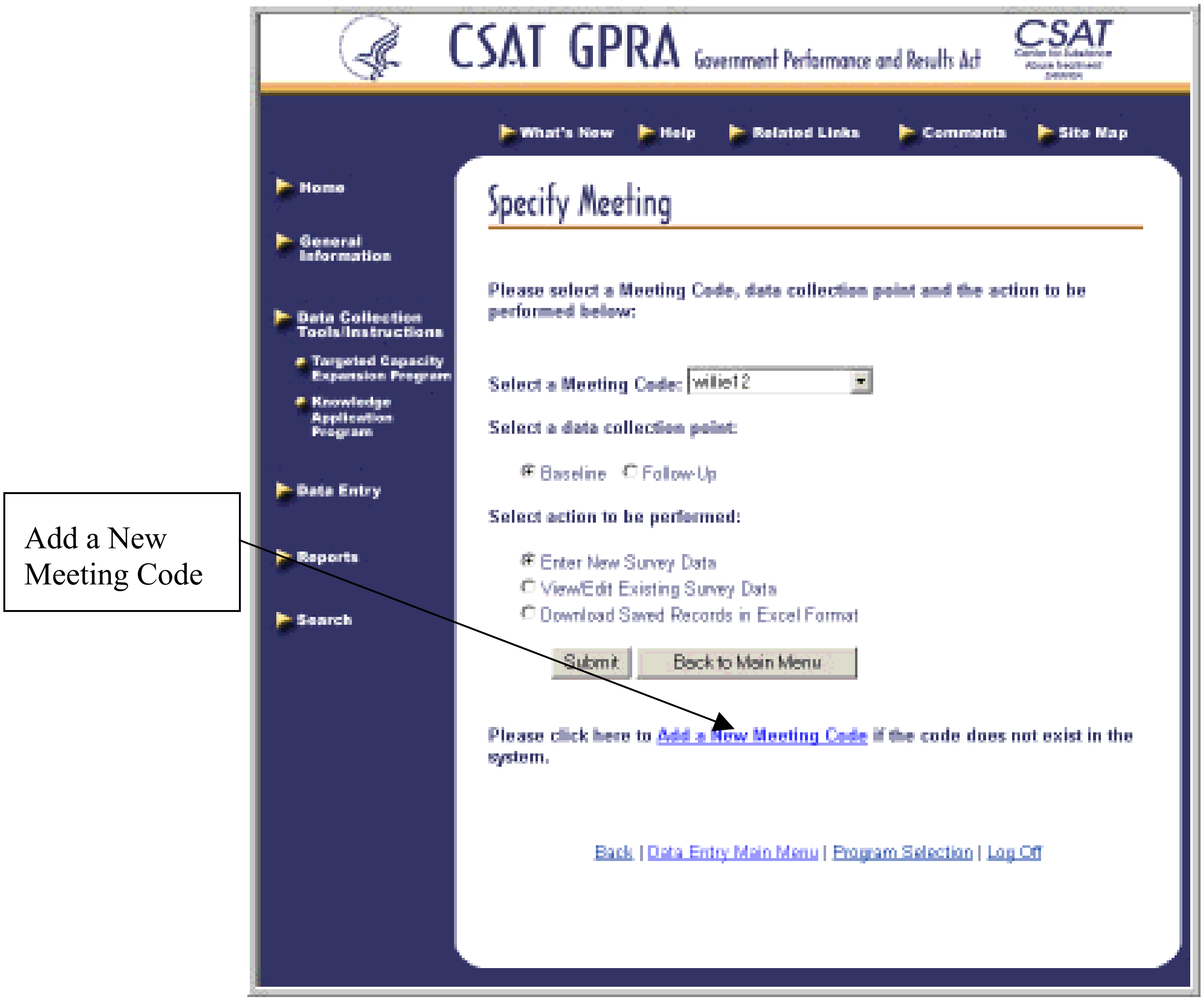


Step 1. Select the Meeting tool.

Step 2. Click the "Submit" button. The **SPECIFY MEETING** page displays.

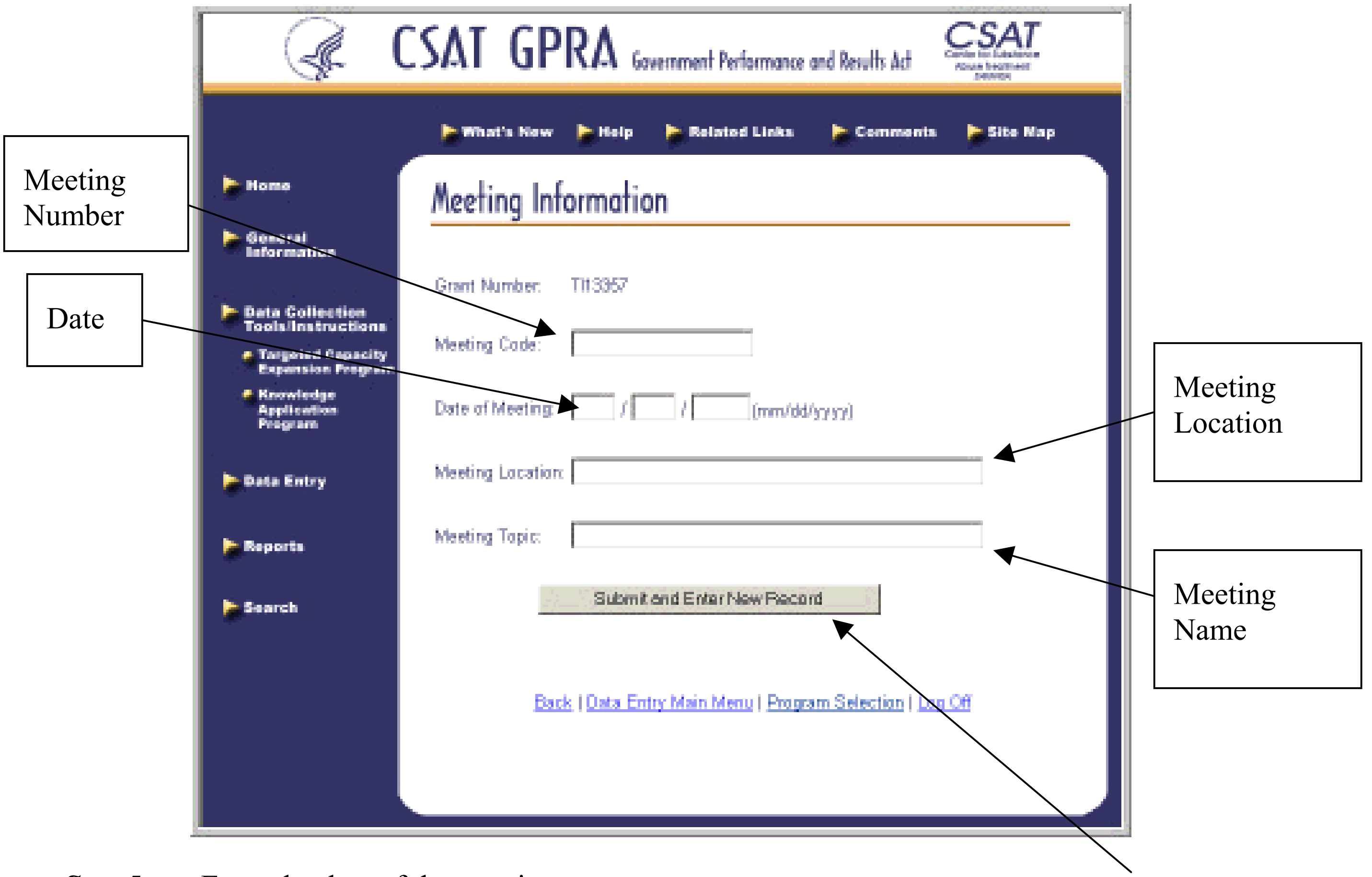
Step 3. Click the Add a New Meeting Code link.

Figure 3-4 – Specify Meeting Page



Step 4. Enter the new meeting code in the block provided. The **MEETING INFORMATION** page displays.

Figure 3-5 – Meeting Information Page



Step 5. Enter the date of the meeting

Step 6. Enter the meeting location.

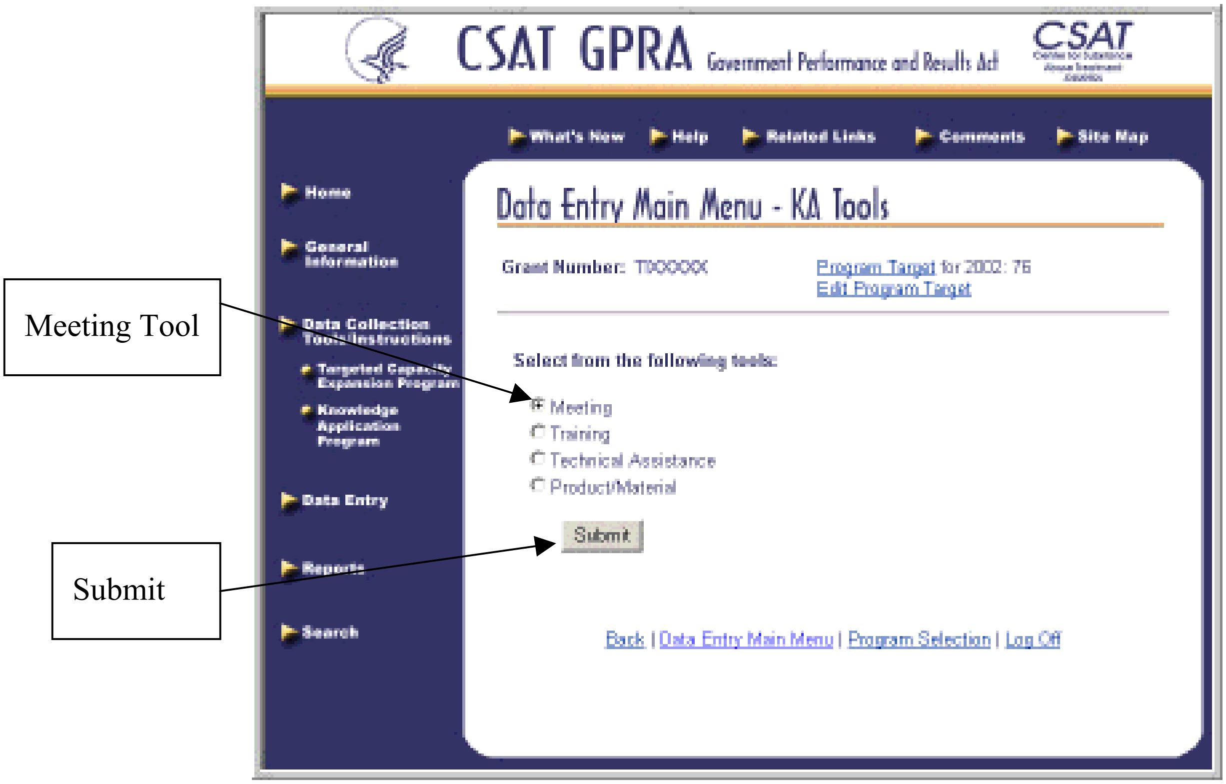
Step 7. Enter the meeting topic.

Step 8. Click the "Submit and Enter a New Record" button. The **BASELINE MEETING SATISFACTION SURVEY** page (or the page for the survey you have chosen) displays.

Enter a New Meeting Baseline Survey

To enter a new meeting baseline survey, go to the **DATA ENTRY MAIN MENU – KA TOOLS** page, and complete the following steps.

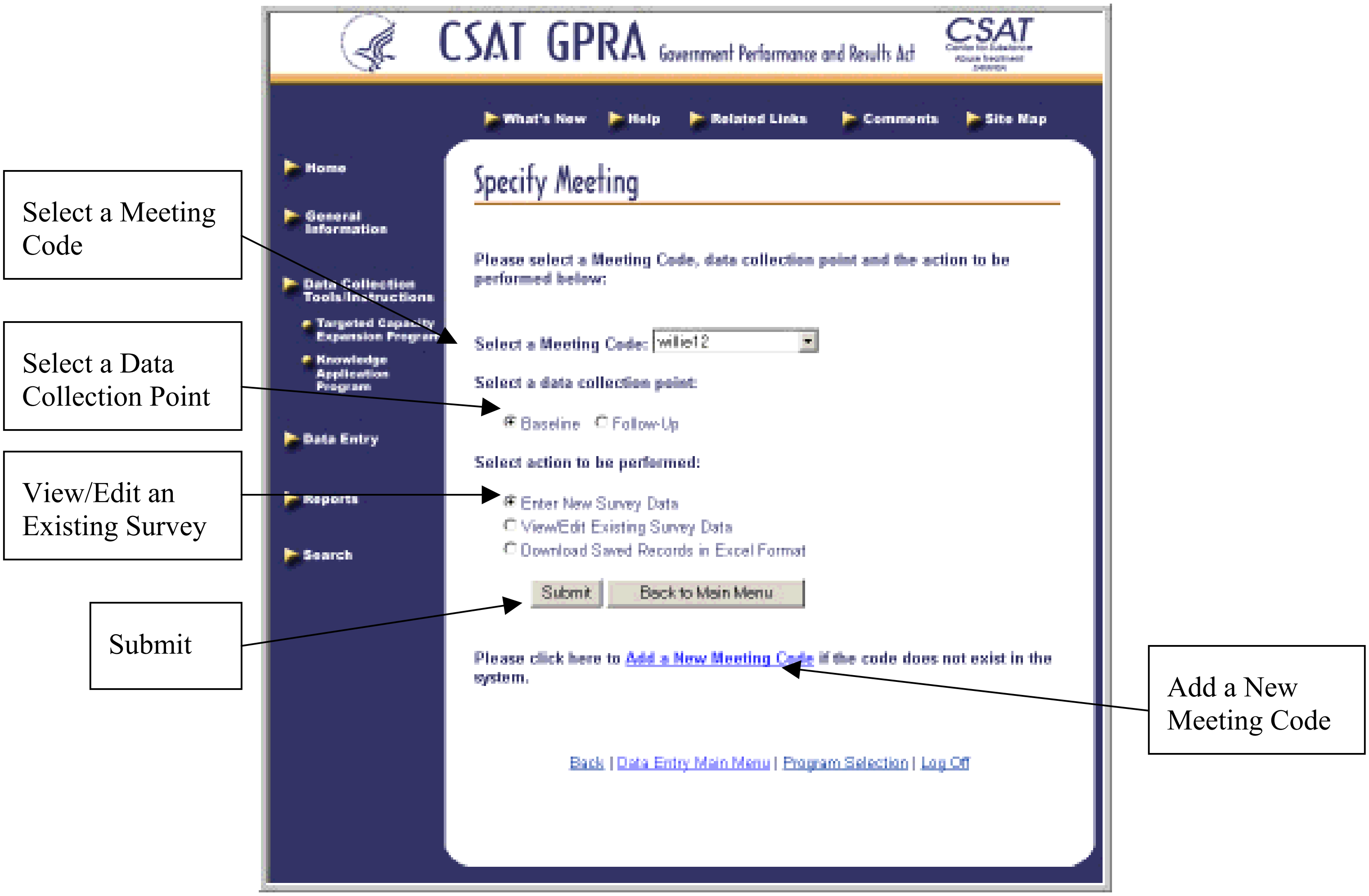
Figure 3-6 – Data Entry Main Menu – KA Tools Page



Step 1. Select the Meeting tool.

Step 2. Click the "Submit" button. The **SPECIFY MEETING** page displays.

Figure 3-7 – Specify Meeting Page



Step 3. Select a meeting code.

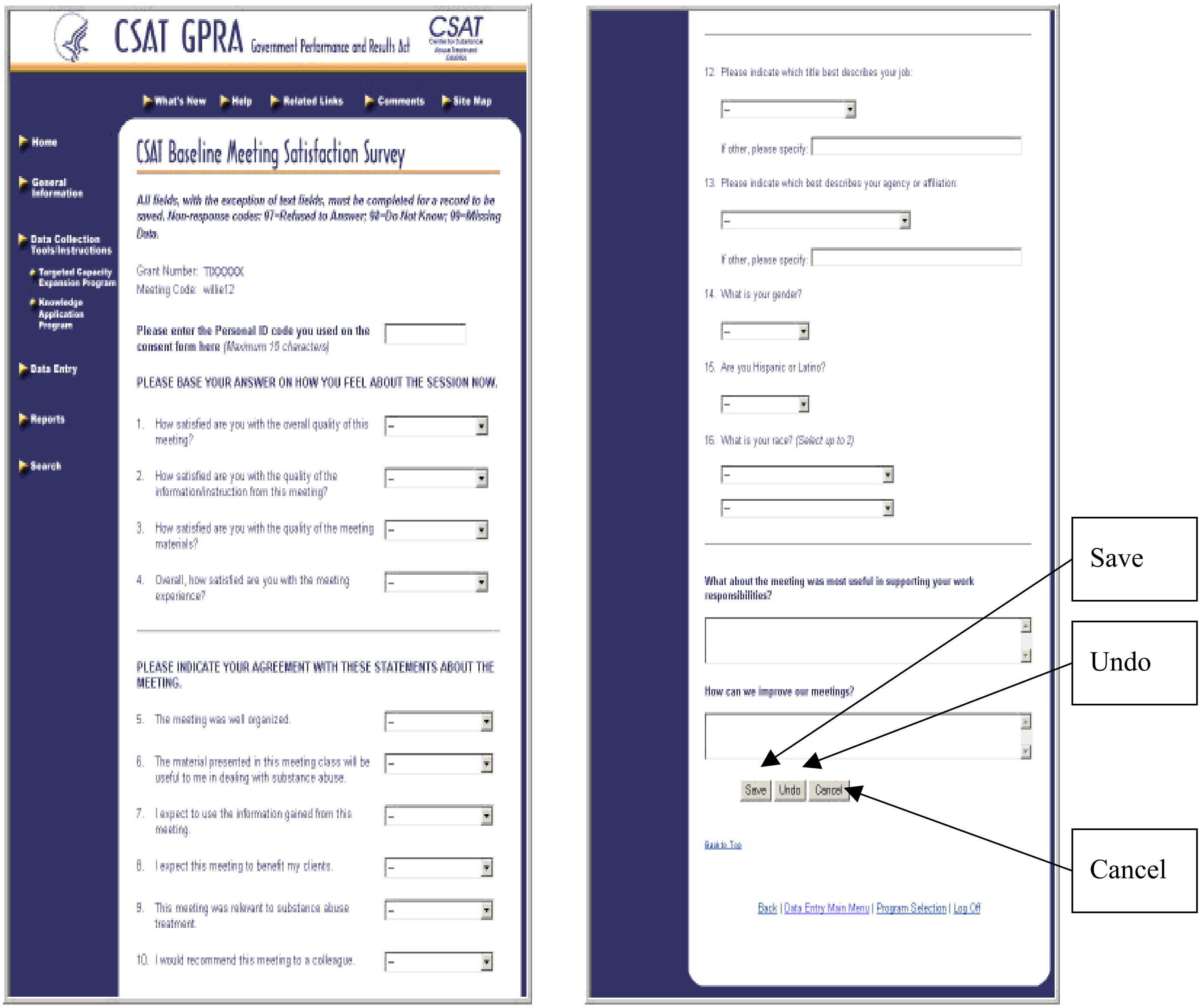
Step 4. Select " Baseline" data collection point.

Step 5. Select "Enter New Survey Data" from the action list.

Step 6. Click the "Submit" button. The **BASELINE MEETING SATISFACTION SURVEY** page displays.

Step6a. Click the "Back to Main Menu" button to return to the **DATA ENTRY MAIN MENU – KA TOOLS** page.

Figure 3-8 – Baseline Meeting Satisfaction Survey Page



Step 7. Complete the survey. The following rules apply when entering a new client record:

- All fields, except text fields, must be filled before the System will advance to the next section
- The cursor will not automatically advance to the next field.
- The TAB button on the keyboard will advance the curser to the next field.
- Do not enter commas, decimals, or symbols in any field.
- Non-response codes for these questions are: 97=Refused to Answer; 98=Do Not Know; 99=Missing Data.

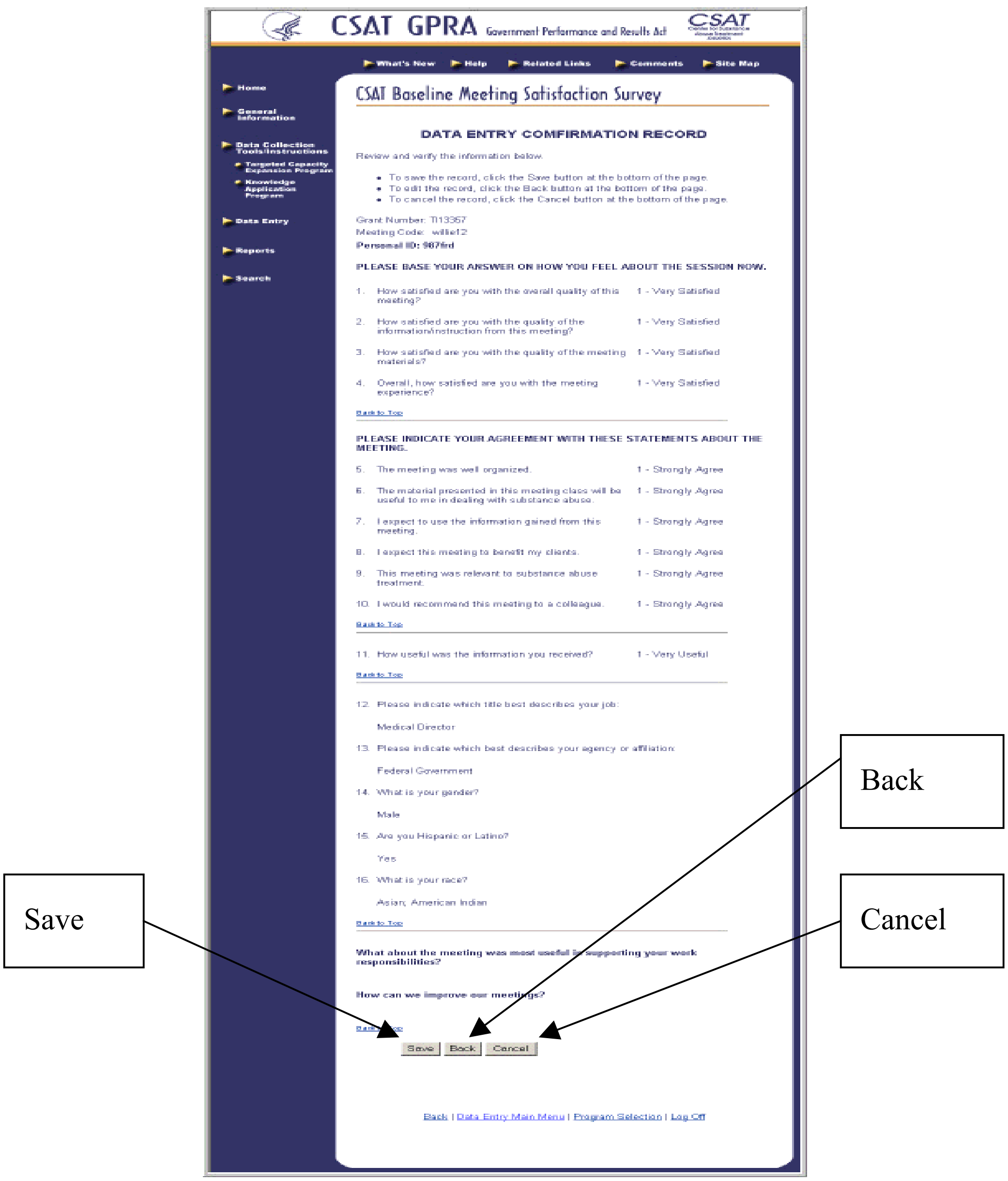
Note: You can access the instructions for completing KA forms under the Data Collection Tools section of the public GPRA Web site.

Step 8. Click the "Save" button to save the record. The **DATA ENTRY CONFIRMATION RECORD** page displays.

Step 8a. Click the "Undo" button to delete the information entered in the record.

Step 8b. Click the "Cancel" button to exit the form and return to the **DATA ENTRY MAIN MENU – KA TOOLS** page.

Figure 3-9 – Data Entry Confirmation Record Page



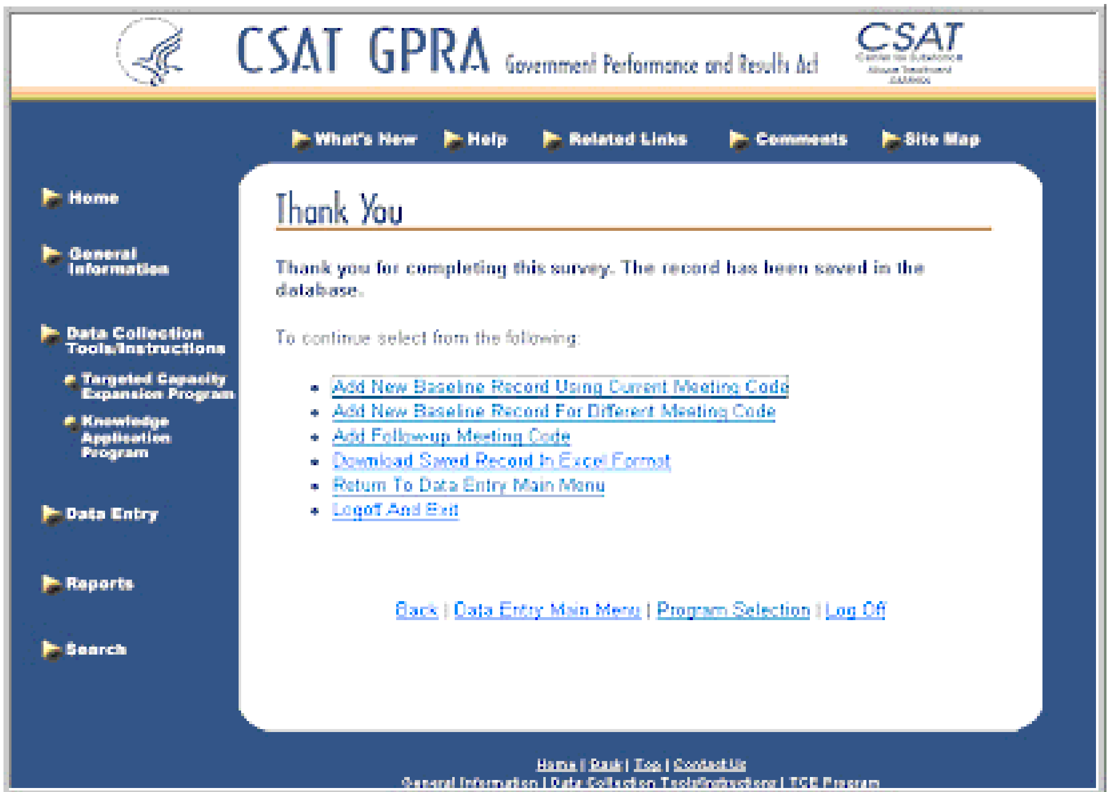
Step 9. Review the information and choose from the following options**:**

Step 9a. Click the "Back" button at the bottom of the page.

Step 9b. Click the "Cancel" button. If you click the "Cancel" button, the entire record will be lost.

Step 9c. Click the "Save**"** button. The **THANK YOU** page displays.

Figure 3-10 – Thank You Page



Step 10. Click the Add New Baseline Record Using Current Meeting Code link to enter a new baseline using the current meeting code.

Step 10a. Click the Add New Baseline Record For Different Meeting Code link to enter a new baseline record for a different meeting code.

Step 10b. Click the Add Follow-up Meeting Code link to enter a follow-up survey for the same meeting code.

Step 10c. To download a saved record in Excel format, click the Download saved record in Excel format link.

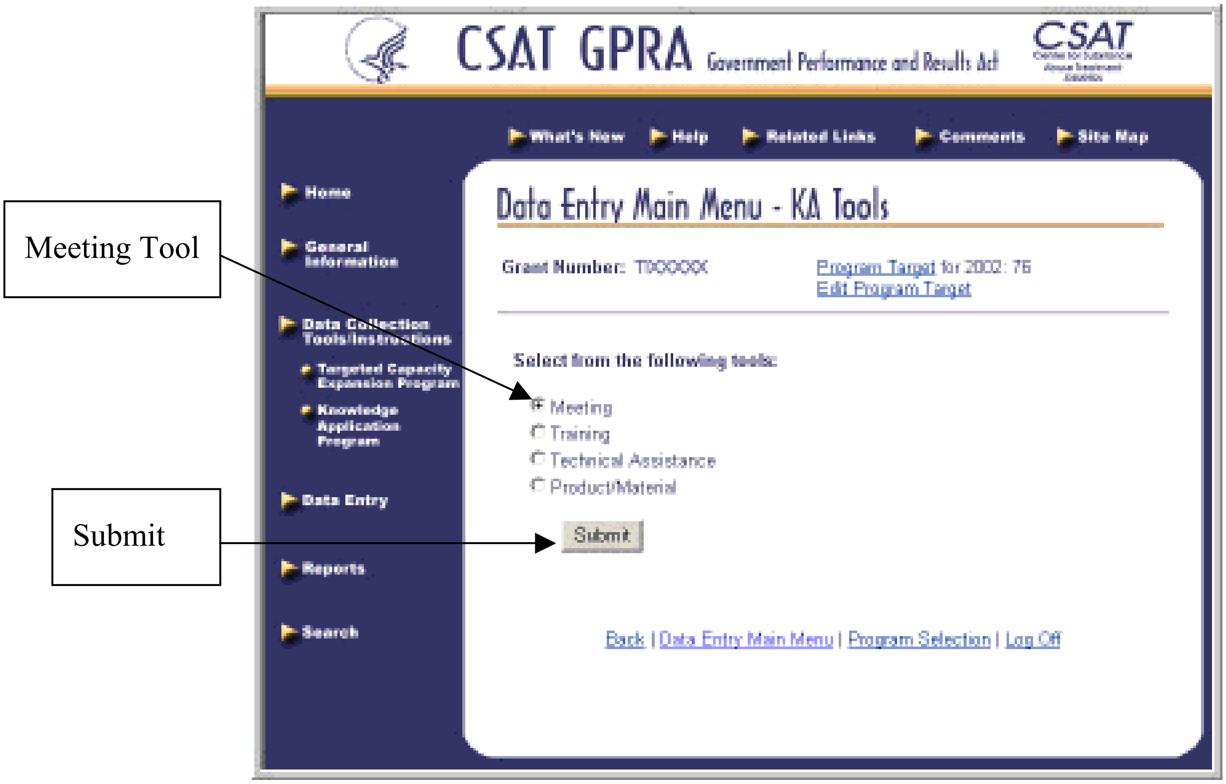
Step 10d. To return to the **DATA ENTRY MAIN MENU – KA TOOLS** page, click the Return to data entry main menu link.

Step 10e. To exit the session and log off of the System, click the Logoff and exit link.

Entering a New Meeting Follow-up Survey

To enter a new meeting follow-up survey, go to the **DATA ENTRY MAIN MENU – KA TOOLS** page, and complete the following steps.

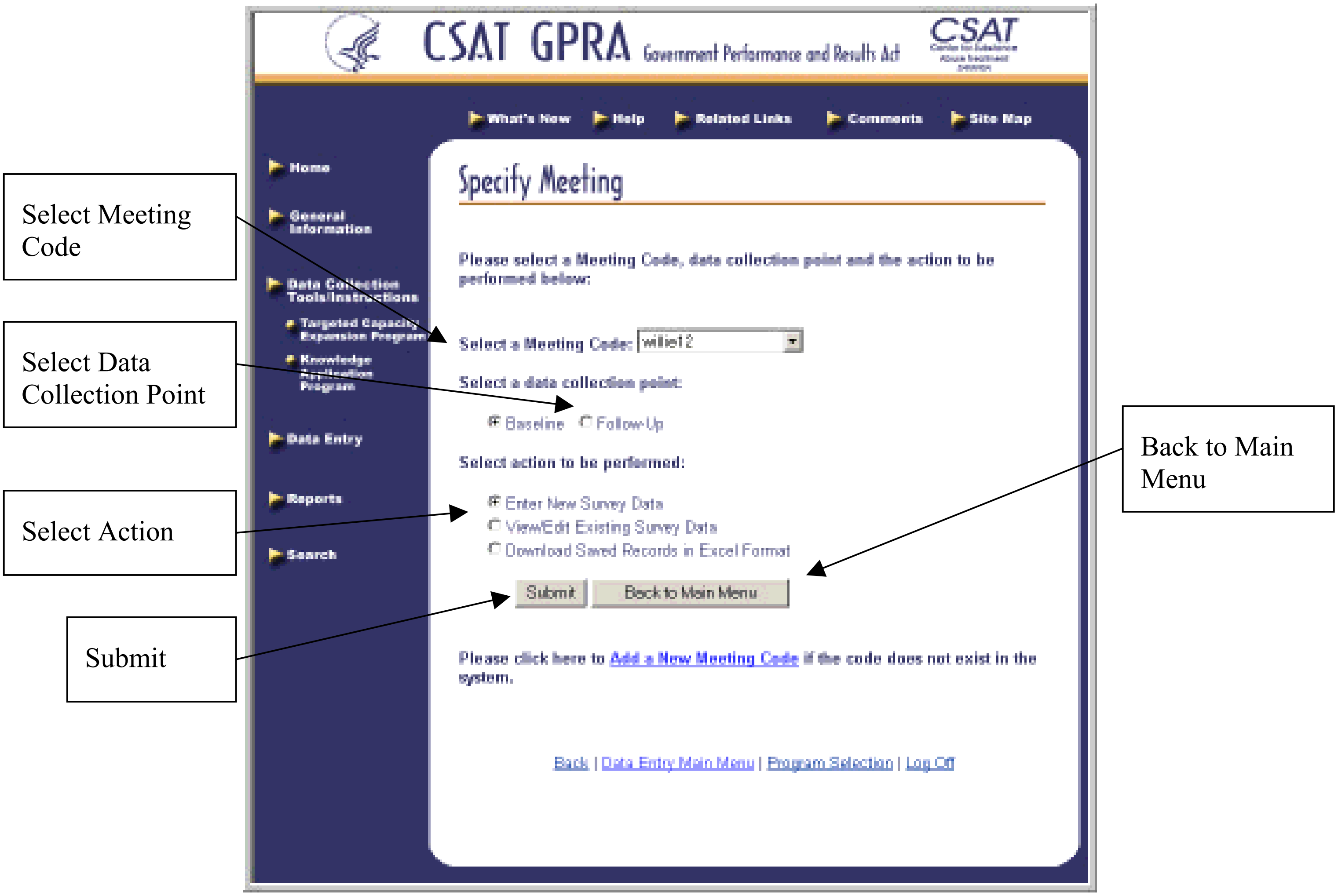
Figure 3-11 – Data Entry Main Menu – KA Tools Page



Step 1. Select the Meeting tool.

Step 2. Click the "Submit" button. The **SPECIFY MEETING** page displays.

Figure 3-12 – Specify Meeting Page



Step 3. Select the meeting tool.

Step 4. Select a meeting code.

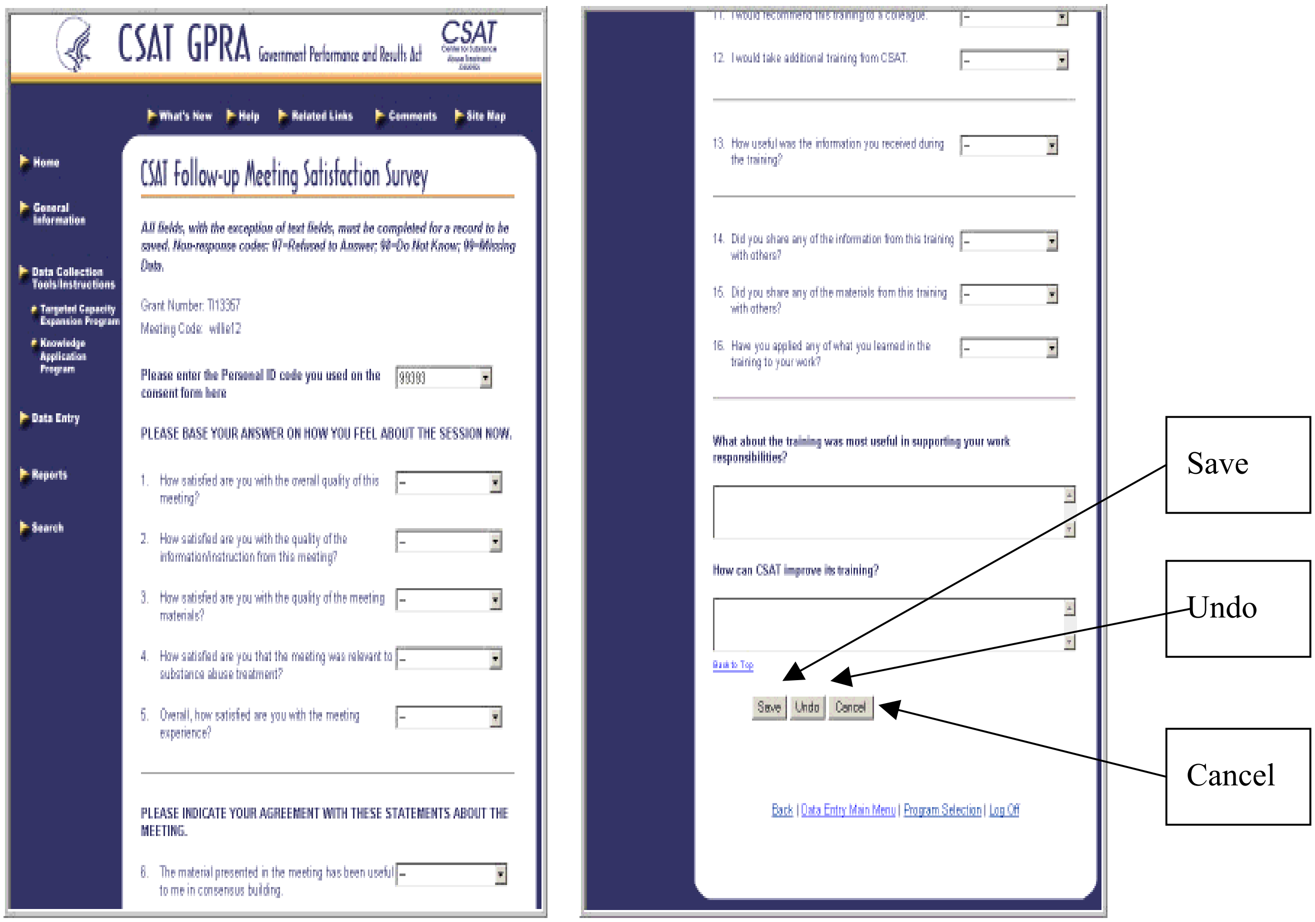
Step 5. Select a baseline data collection point.

Step 6. Select "Enter New Baseline Data" from the action list.

Step 7. Click the "Submit" button. The **BASELINE FOLLOW-UP SATISFACTION SURVEY** page displays.

Step7a. Click the "Back to Main Menu" button to return to the **DATA ENTRY MAIN MENU – KA TOOLS** page displays.

Figure-3-13 – Follow-up Meeting Satisfaction Survey Page



Step 8. Complete the survey. The following rules apply when entering a new client record:

- All fields, except text fields, must be filled before the System will advance to the next section
- The cursor will not automatically advance to the next field.
- The TAB button on the keyboard will advance the curser to the next blank field.
- Do not enter commas, decimals, or symbols in any field.
- Non-response codes for these questions are: 97=Refused to Answer; 98=Do Not Know; 99=Missing Data.

Note: You can access the instructions for completing KA forms under the Data Collection Tools section of the public GPRA Web site.

Step 9. Click the "Save" button to save the record. The **DATA ENTRY CONFIRMATION RECORD** page displays.

Step 9a. Click the "Undo" button to delete the information entered in the record.

Step 9b. Click the "Cancel" button to exit the survey and return to the **DATA ENTRY MAIN MENU – KA TOOLS** page.

Figure 3-14 – Data Entry Confirmation Record Page

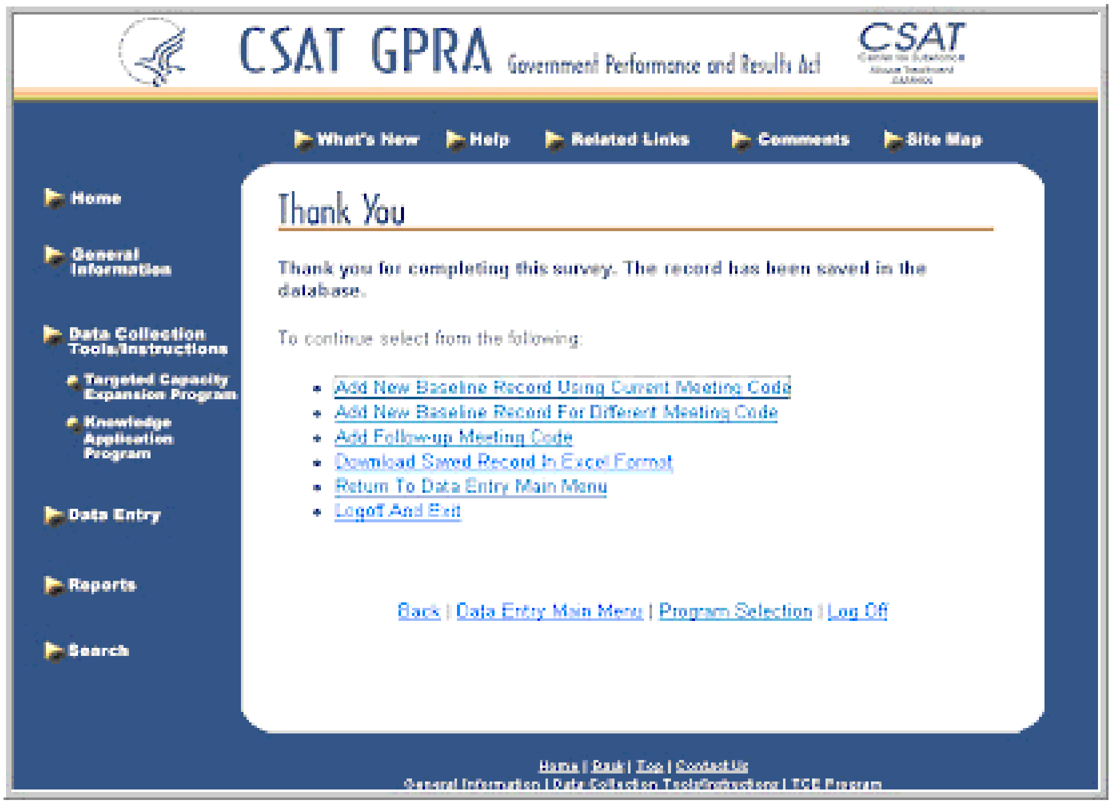
Step 10. Review the entered information.

Step 11. Click the "Save" button to save the record. The **THANK YOU** page displays.

Step11a. Click the "Undo" button to delete the information entered in the record.

Step 11b. Click the "Cancel" button to exit the survey and return to the **DATA ENTRY MAIN MENU – KA TOOLS** page.

Figure 3-15 – Thank You Page



Step 12. Click the Add New Baseline Record Using Current Meeting Code link to enter a new baseline using the current meeting code.

Step 12a. Click the Add New Baseline Record For Different Meeting Code link to enter a new baseline record for a different meeting code.

Step 12b. Click the Add Follow-up Meeting Code link to enter a follow-up survey for the same meeting code.

Step 12c. To download a saved record in Excel format, click the Download saved record in Excel format link.

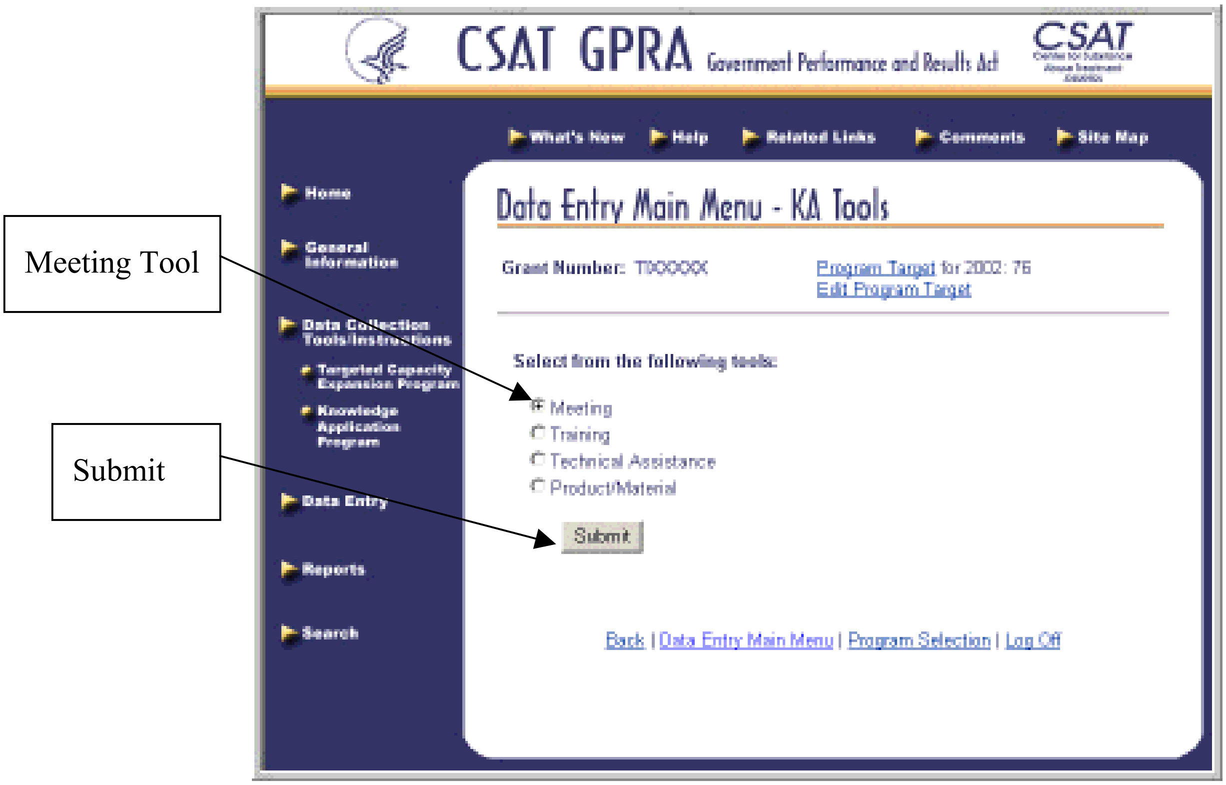
Step 12d. To return to the **DATA ENTRY MAIN MENU – KA TOOLS** page, click the Return to data entry main menu link.

Step 12e. To exit the session and log off of the System, click the Logoff and exit link.

Viewing or Editing an Existing Meeting Baseline or Follow-up Record

To view or edit an existing meeting baseline or follow-up survey, go to the **DATA ENTRY MAIN MENU – KA TOOLS** page, and complete the following steps.

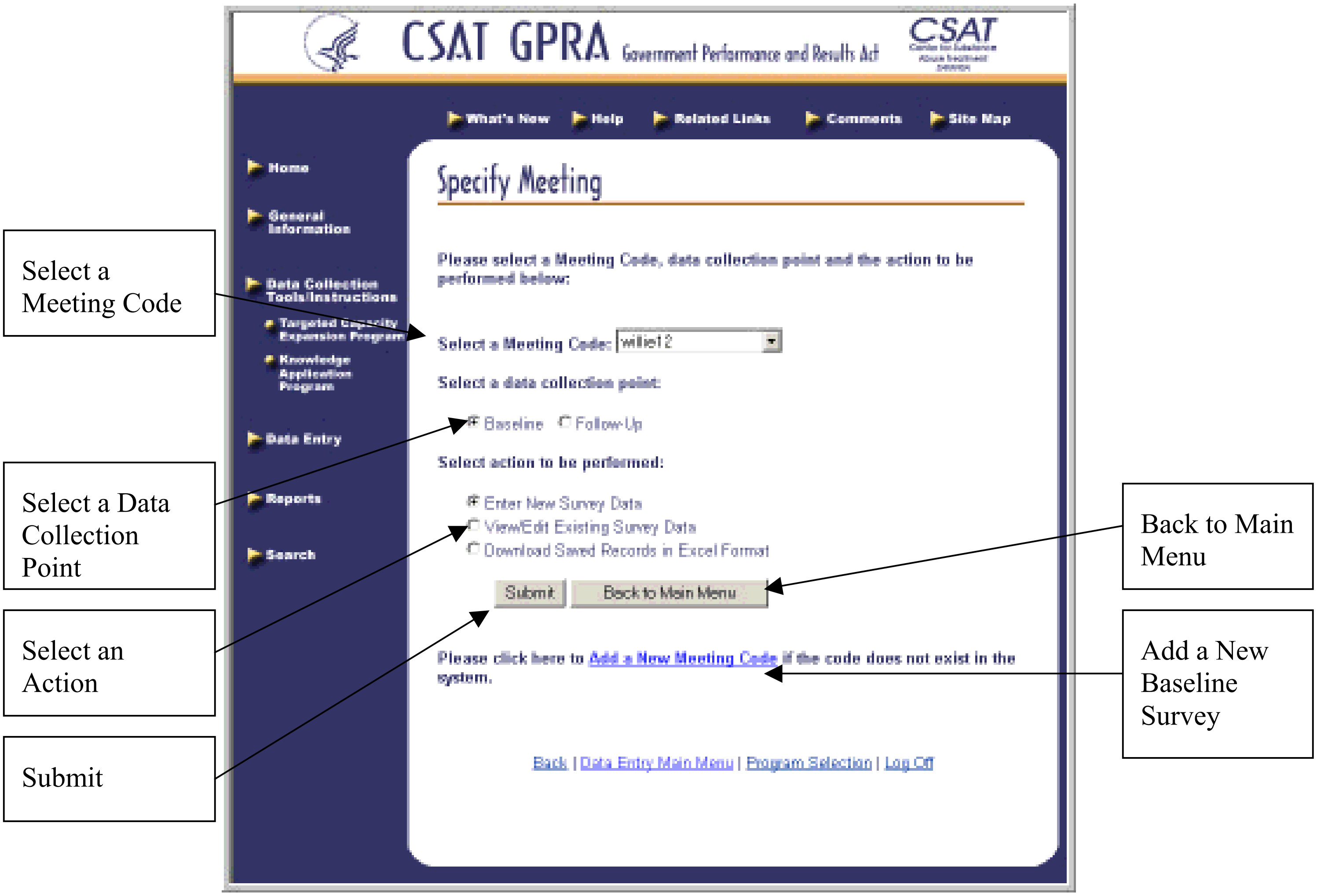
Figure 3-16 – Data Entry Main Menu – KA Tools Page



Step 1. Select the Meeting tool.

Step 2. Click the "Submit" button. The **SPECIFY MEETING** page displays.

Figure 3-17 – Specify Meeting Page



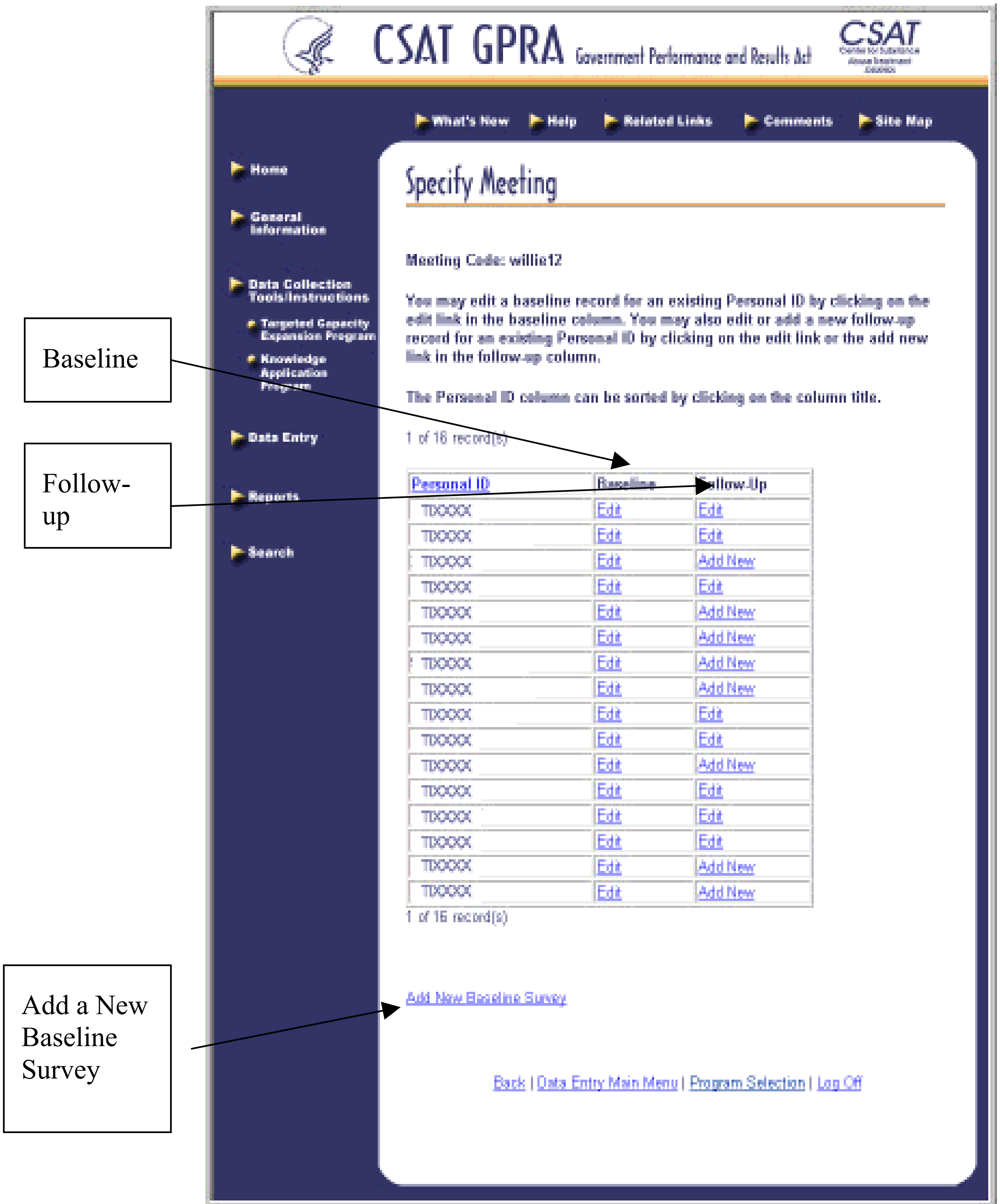
Step 3. Select the meeting code you wish to view/edit.

Step 4. Select the data collection point.

Step 5. Select "View/Edit Existing Survey Data" from the list of actions.

Step 6. Click the "Submit" button. A second **SPECIFY MEETING** page displays.

Figure 3-18 – Specify Meeting Page

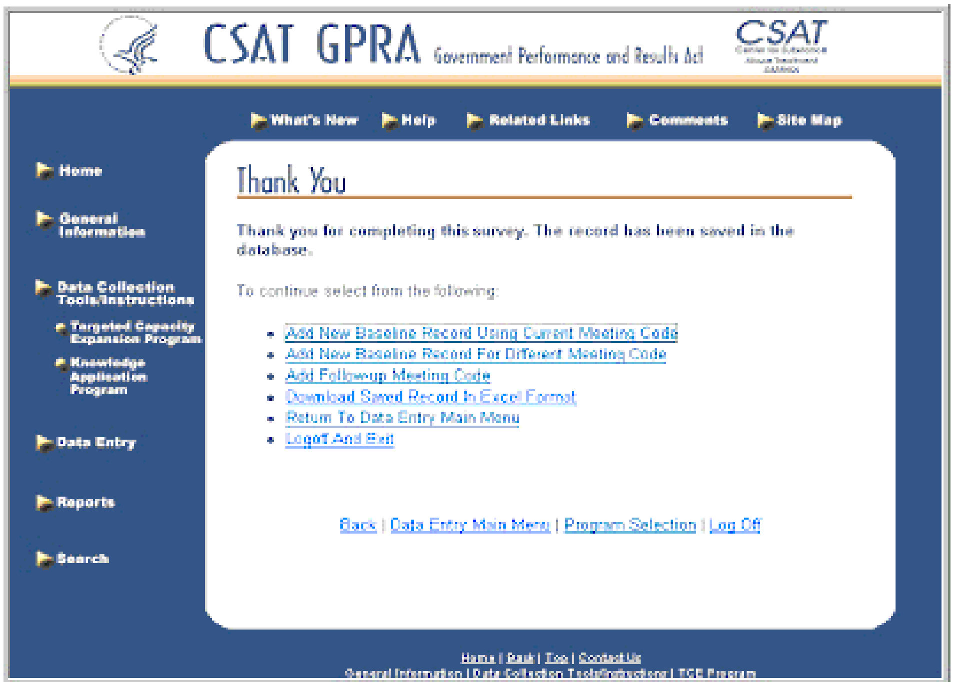


Step 7. Select the type (baseline or follow-up) of survey you wish to view or edit. The completed **BASELINE/FOLLOW-UP MEETING SATISFACTION SURVEY** page displays.

Note: You also have the choice of adding a new baseline survey. To add a new baseline survey, click the Add New Baseline Survey link at the bottom of the page.

Step 8. Review the saved data, or complete the desired edits, and **click** the "Save" button. The **THANK YOU** page displays.

Figure 3-19 – Thank You Page



Step 8a. Click the "Undo" button to delete the information entered in the record.

Step 8b. If you click the "Cancel" button, all information in the survey will be lost. You will exit the survey and return to the **DATA ENTRY MAIN MENU – KA TOOLS** page.

Step 9. Click the Add New Baseline Record Using Current Meeting Code link to enter a new baseline using the current meeting code.

Step 9a. Click the Add New Baseline Record For Different Meeting Code link to enter a new baseline record for a different meeting code.

Step 9b. Click the Add Follow-up Meeting Code link to enter a follow-up survey for the same meeting code.

Step 9c. To download a saved record in Excel format, click the Download saved record in Excel format link.

Step 9d. To return to the **DATA ENTRY MAIN MENU – KA TOOLS** page, click the Return to data entry main menu link.

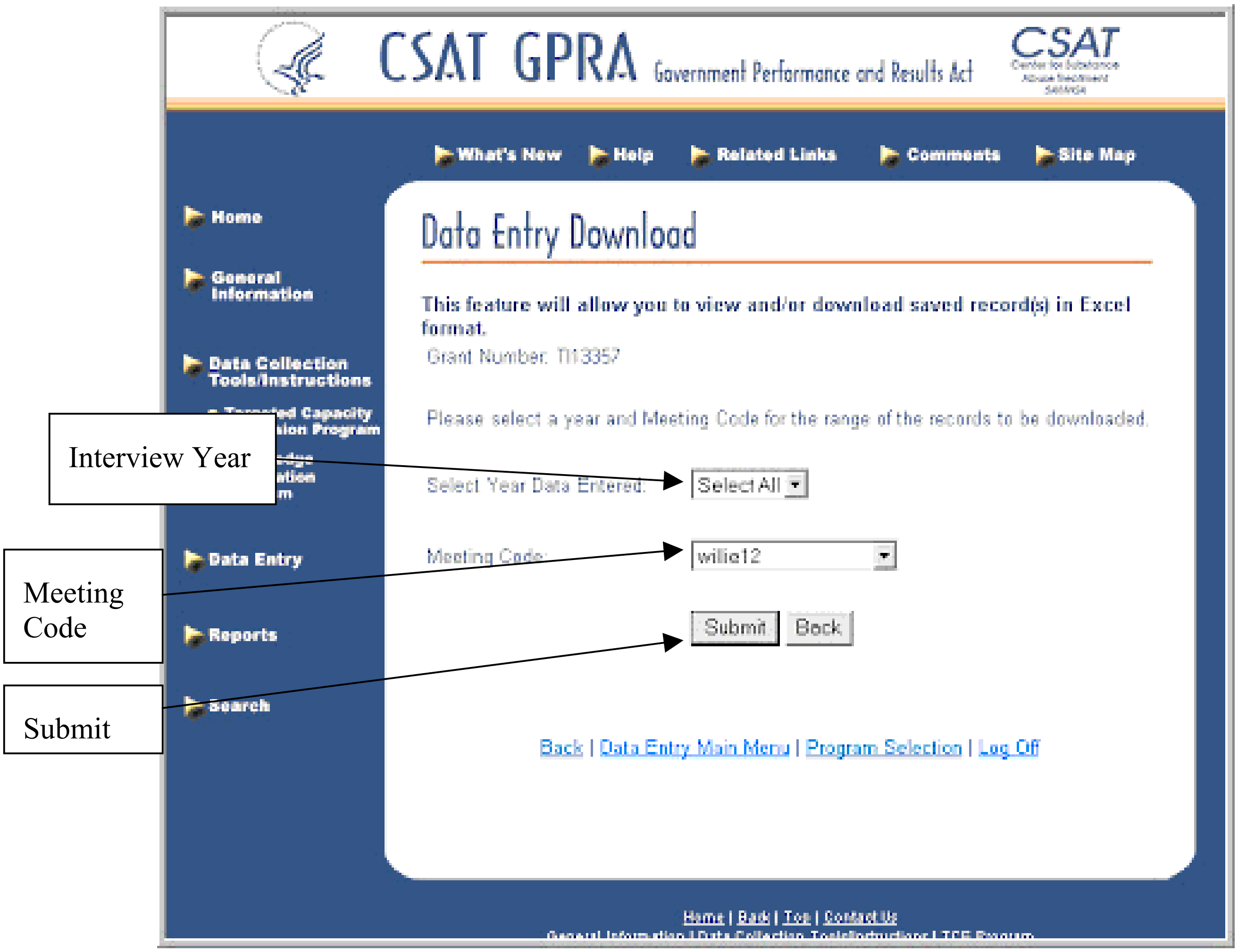
Step 9e. To exit the session and log off of the System, click the Logoff and exit link.

Downloading a Saved Record

To download a saved client record, complete the following steps. (Records will be downloaded in Excel format.)

Step 1. Click the Download saved record in Excel format link on the **THANK YOU** page. The **DATA ENTRY DOWNLOAD** page displays.

Figure 3-20 – Data Entry Download Page

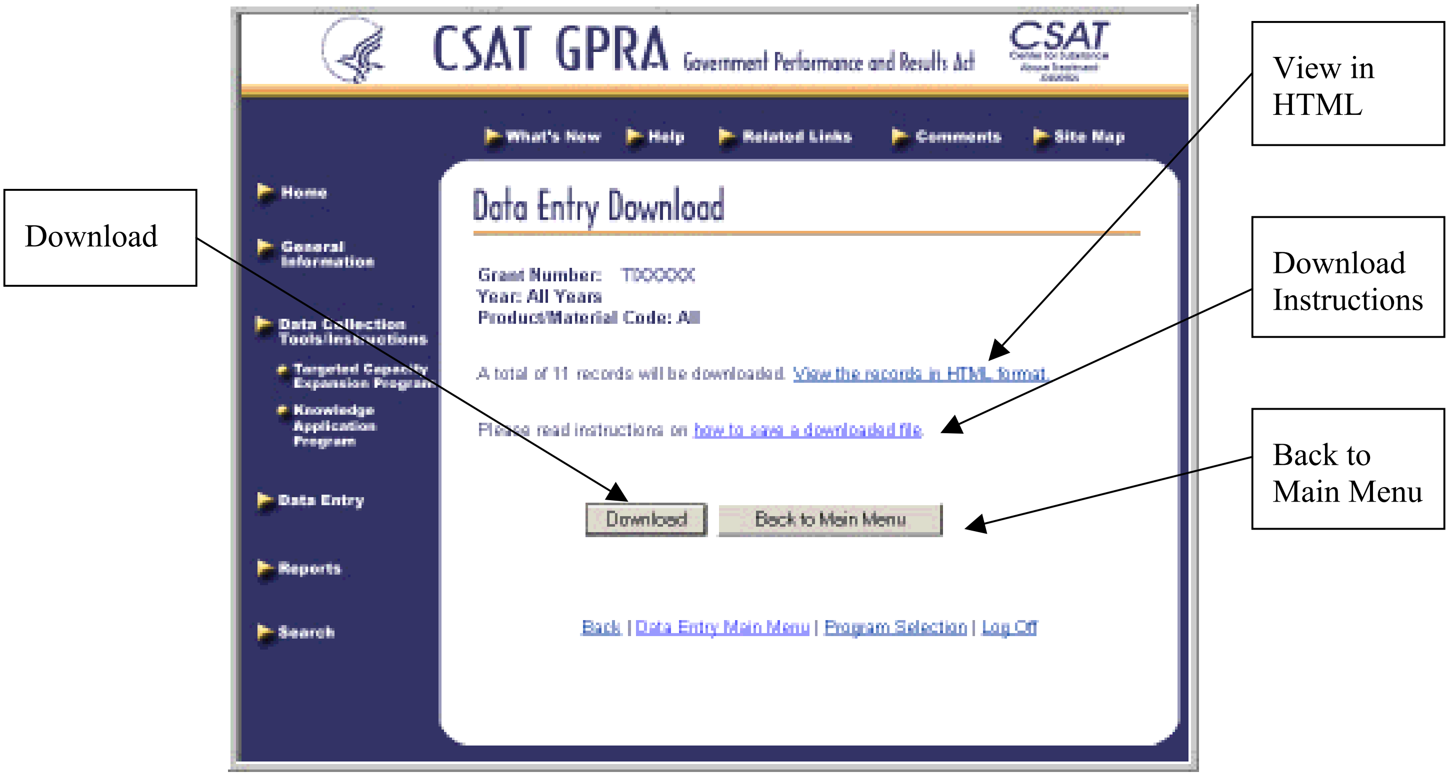


Step 2 Choose an interview year from the drop-down box.

Step 3 Choose the meeting code from the drop-down box.

Step 4. Click the "Submit" button. The **DATA ENTRY DOWNLOAD** page displays.

Figure 3-21 – Data Entry Download Page



Step 5. Click the "Download" button.

Step 5a. To view the report in HTML format, click the View the records in HTML format. link.

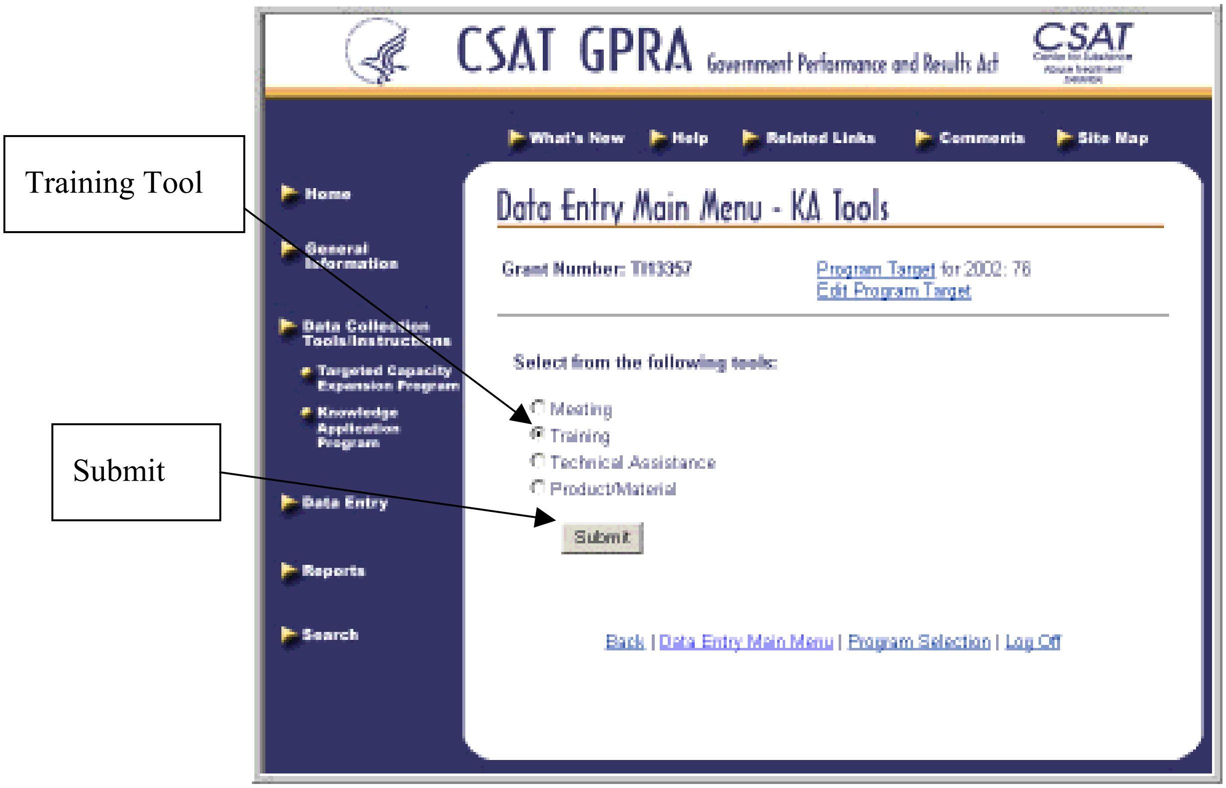
Step 5b. For instructions on how to download a file, click the How to save a downloaded file. link.

Step 5c. Click the "Back to Main Menu" button to return to the **DATA ENTRY MAIN MENU – KA TOOLS** page.

Entering a New Training Baseline Survey

To enter a new training baseline survey, go to the **DATA ENTRY MAIN MENU – KA TOOLS** page, and complete the following steps.

Figure 3-22 – Data Entry Main Menu – KA Tools Page



Step 1. Select the Training tool.

Step 2. Click the "Submit" button. The **SPECIFY TRAINING** page displays.

Figure 3-23 – Specify Training Page

Step 3. Select a training code.

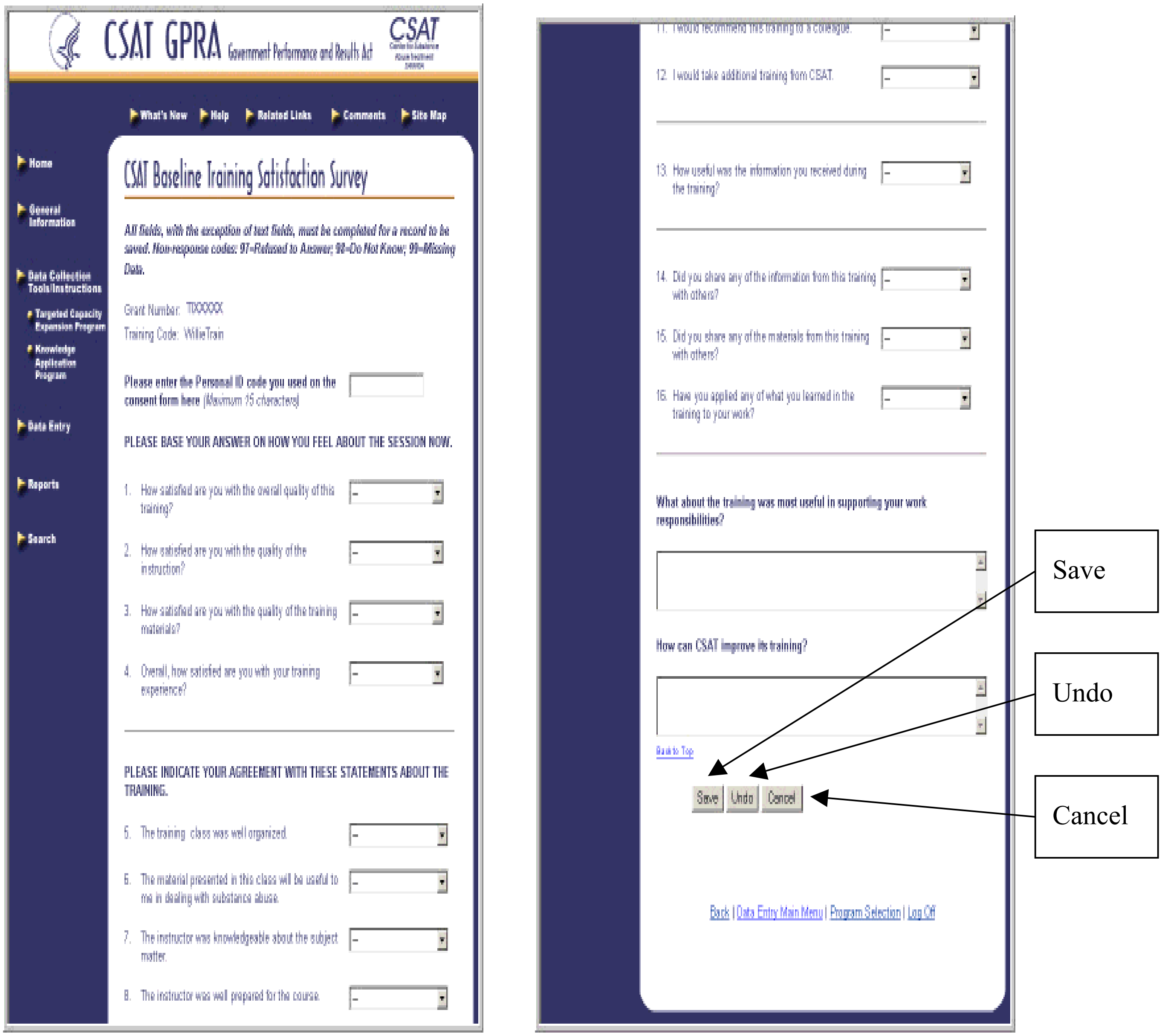
Step 4. Select a baseline data collection point.

Step 5. Select "Enter New Baseline Data" from the action list.

Step 6. Click the "Submit" button. The **BASELINE TRAINING SATISFACTION SURVEY** page displays.

Step6a. Click "Back to Main Menu" to return to the **DATA ENTRY MAIN MENU – KA TOOLS** page.

Figure 3-24 – Baseline Training Satisfaction Survey Page



Step 7. Complete the survey. The following rules apply when entering a new client record:

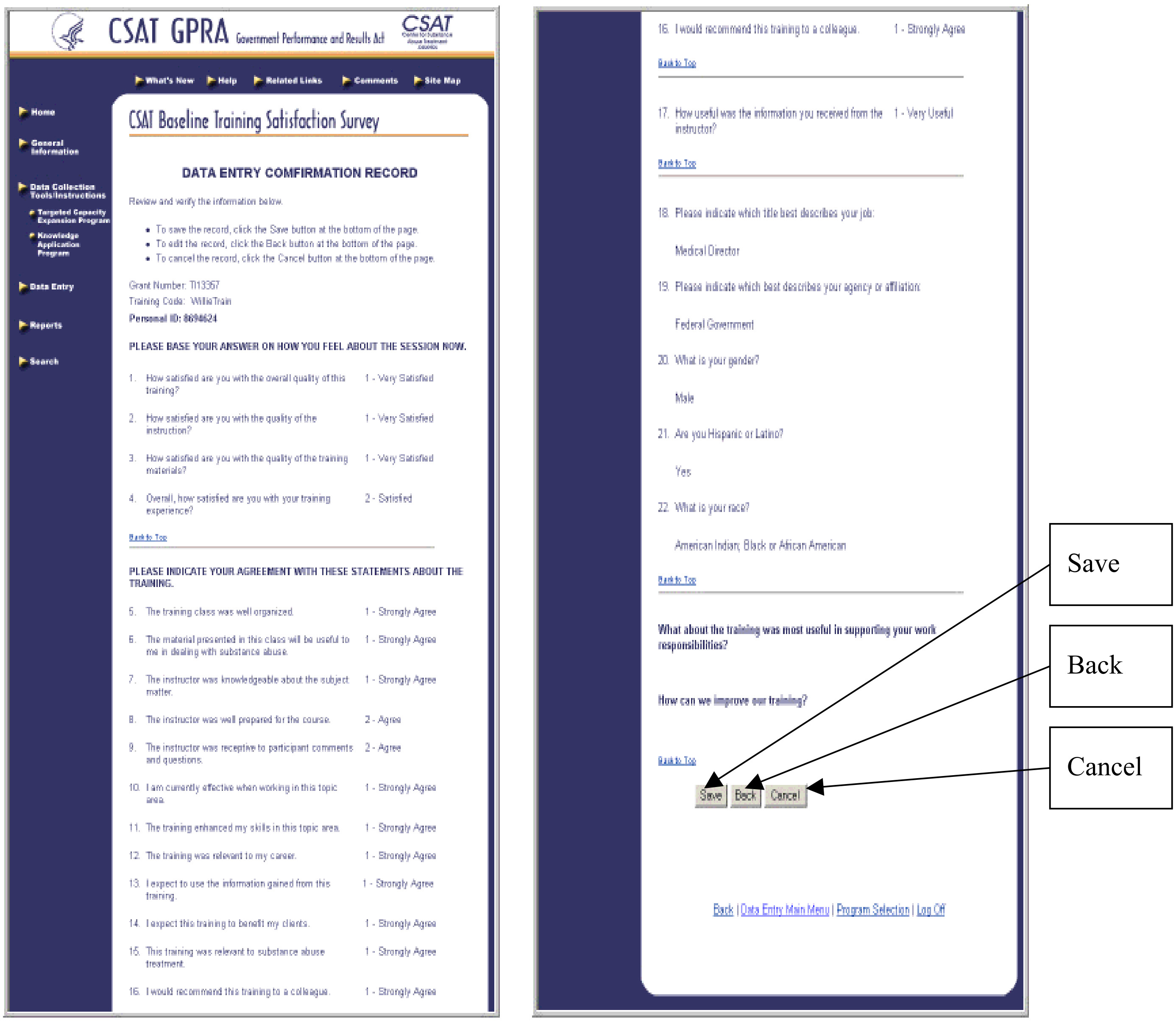
- All fields, except text fields, must be filled before the System will advance to the next section
- The cursor will not automatically advance to the next field.
- The TAB button on the keyboard will advance the curser to the next blank field.
- Do not enter commas, decimals, or symbols in any field.

- Non-response codes for these questions are: 97=Refused to Answer; 98=Do Not Know; 99=Missing Data.

Note: You can access instructions for completing KA forms under the Data Collection Tools section of the public GPRA Web site.

Step 8. Click the "Save" button to save the record. The **DATA ENTRY CONFIRMATION RECORD** page displays.

Figure 3-25 – Data Entry Confirmation Record Page

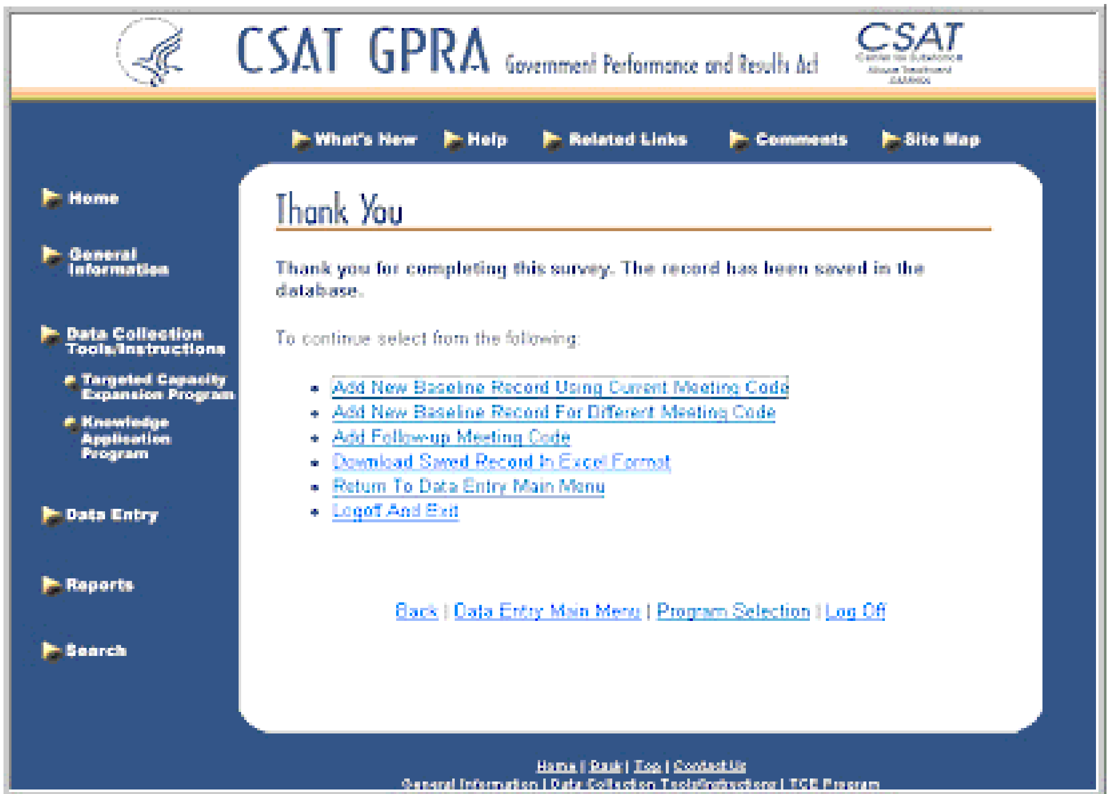


Step 8a. Click the "Undo" button to delete the information entered in the record.

Step 9. Review the entered information.

Step 10. Click the "Save" button to save the record. The **THANK YOU** page displays.

Figure 3-26 – Thank You Page



Step 10a. Click the "Undo" button to delete the information entered in the record.

Step 10b. Click the "Cancel" button to exit the survey and return to the **DATA ENTRY MAIN MENU – KA TOOLS** page.

Step 11. Click the Add New Baseline Record Using Current Training Code link to enter a new baseline using the current meeting code.

Step 11a. Click the Add New Baseline Record For Different Training Code link to enter a new baseline record for a different meeting code.

Step 11b. Click the Add a Follow-up Training Code link to enter a follow-up survey for the same meeting code.

Step11c. To download a saved record in Excel format, click the Download saved record in Excel format link.

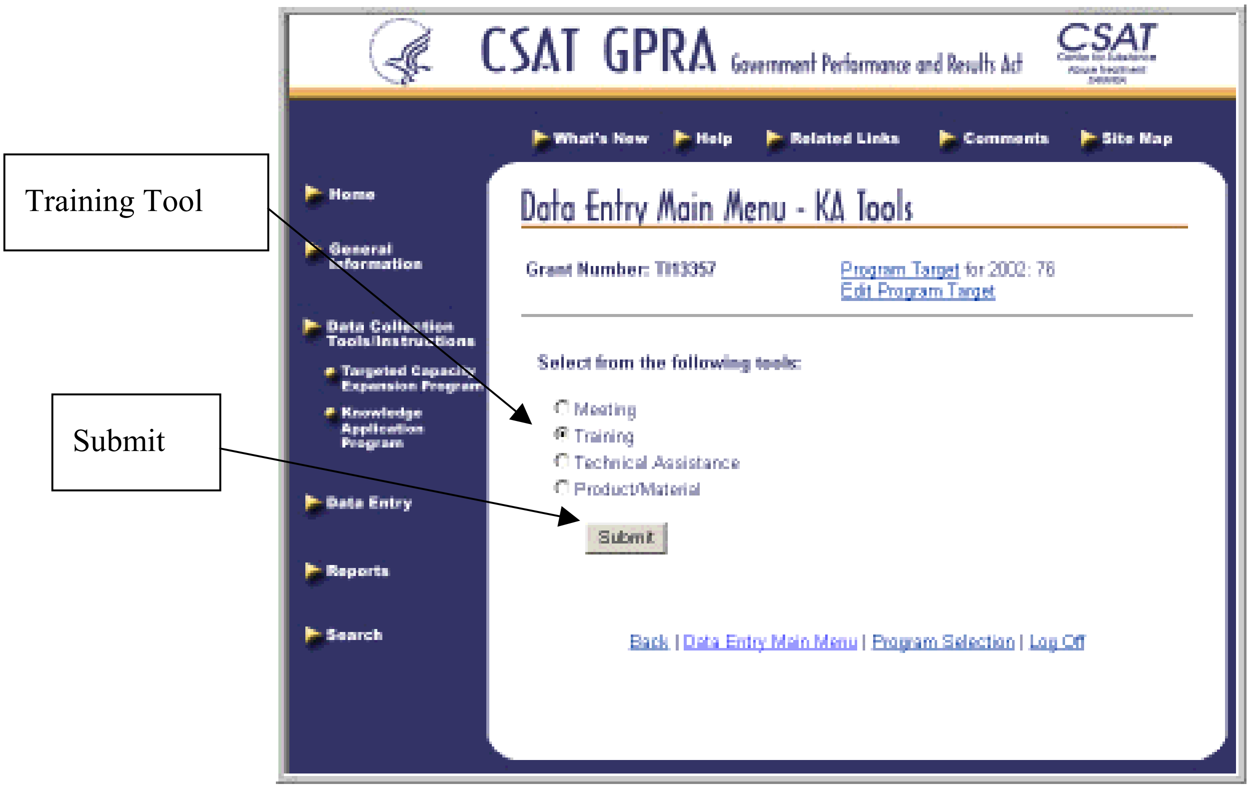
Step 11d. To return to the **DATA ENTRY MAIN MENU – KA TOOLS** page, click the Return to data entry main menu link.

Step11e. To exit the session and log off of the System, click the Logoff and exit link

Entering a New Follow-up Training Survey

To enter a new training follow-up survey, go to the **DATA ENTRY MAIN MENU – KA TOOLS** page, and complete the following steps.

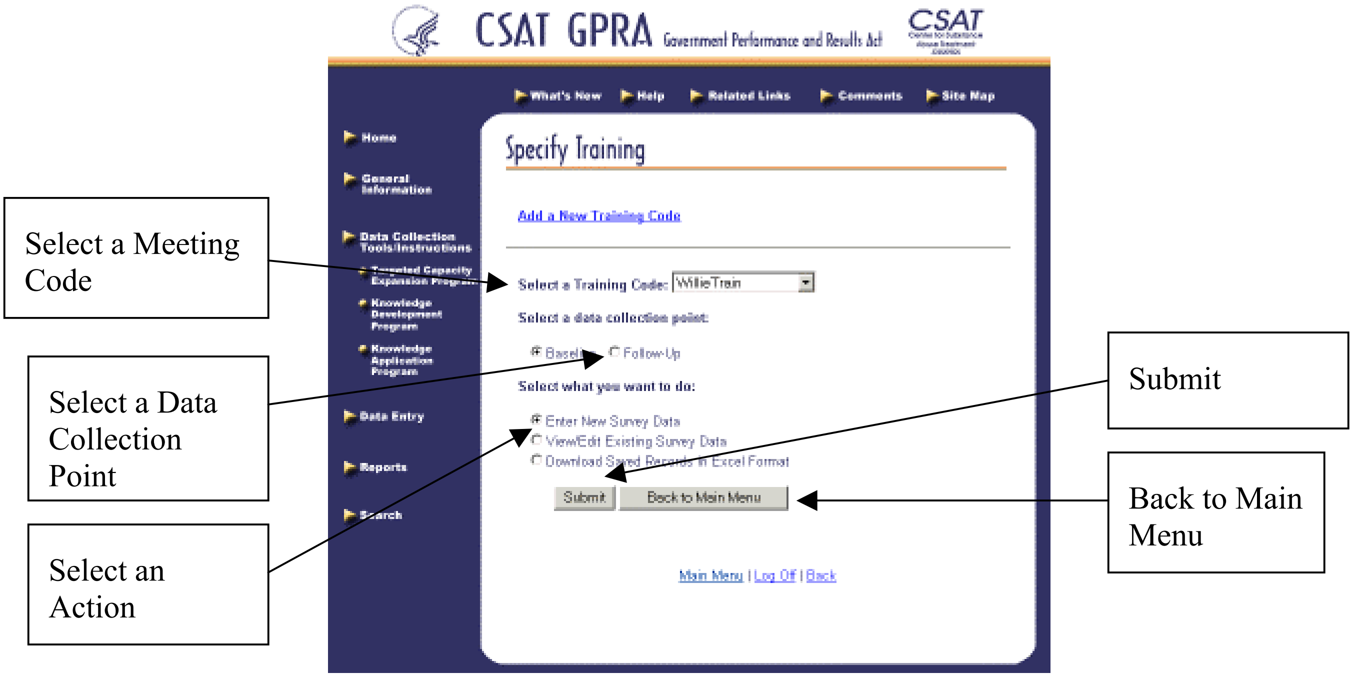
Figure 3-27 – Data Entry Main Menu – KA Tools



Step 1. Select the Training tool.

Step 2. Click the "Submit" button. The **SPECIFY TRAINING** page displays.

Figure 3-28 – Specify Training Page



Step 3. Select a training code.

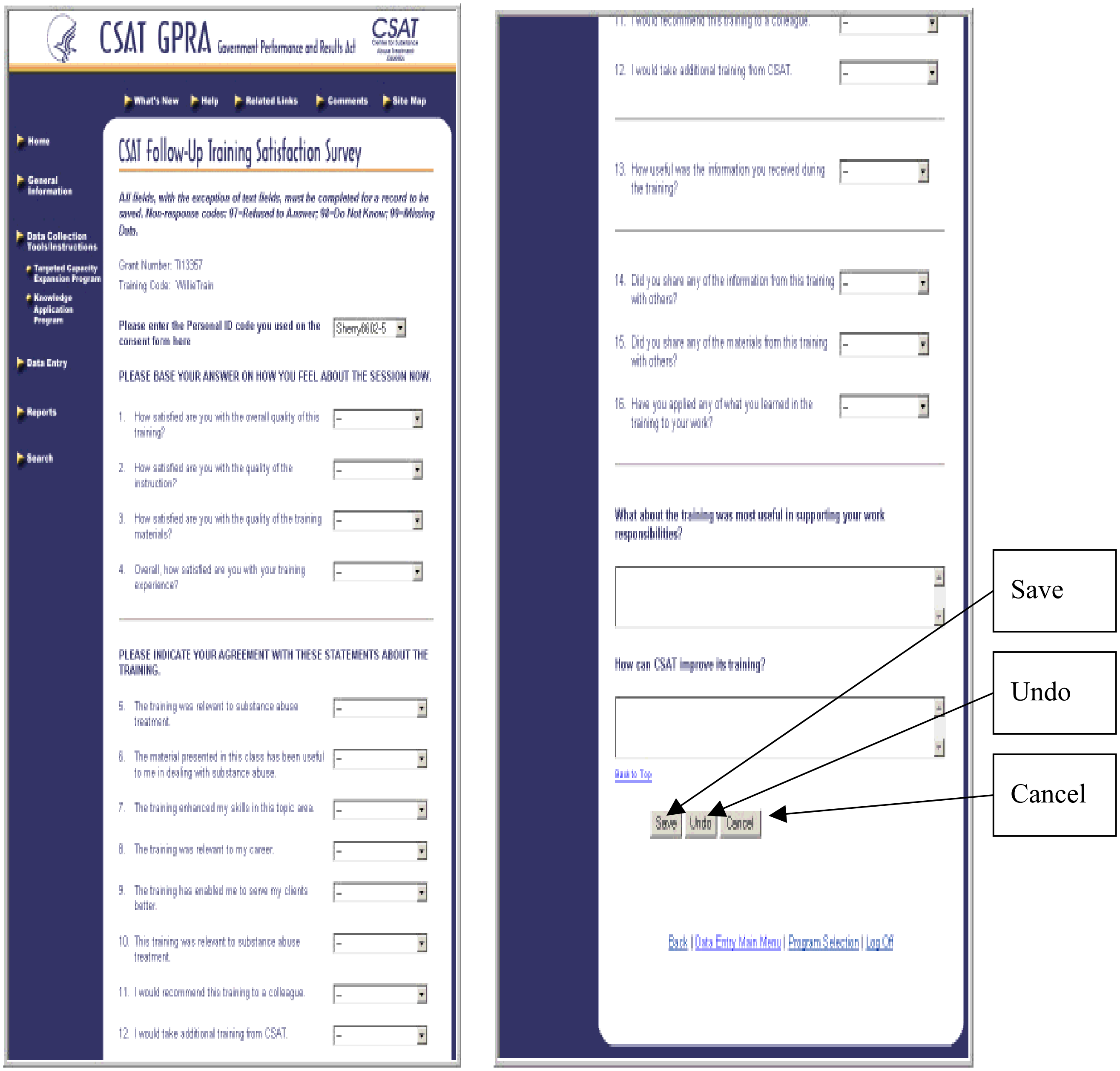
Step 4. Select a baseline data collection point.

Step 5 Select "Enter New Baseline Data" from the action list.

Step 6. Click the "Submit" button. The **BASELINE TRAINING SATISFACTION SURVEY** page displays.

Step 6a. Click the "Back to Main Menu" button to return to the **DATA ENTRY MAIN MENU – KA TOOLS** page.

Figure 3-29 – Follow-up Training Satisfaction Survey Page



Step 7. Complete the survey. The following rules apply when entering a new client record:

- All fields, except text fields, must be filled before the System will advance to the next section
- The cursor will not automatically advance to the next field.
- The TAB button on the keyboard will advance the curser to the next blank field.
- Do not enter commas, decimals, or symbols in any field.

- Non-response codes for these questions are: 97=Refused to Answer; 98=Do Not Know; 99=Missing Data.

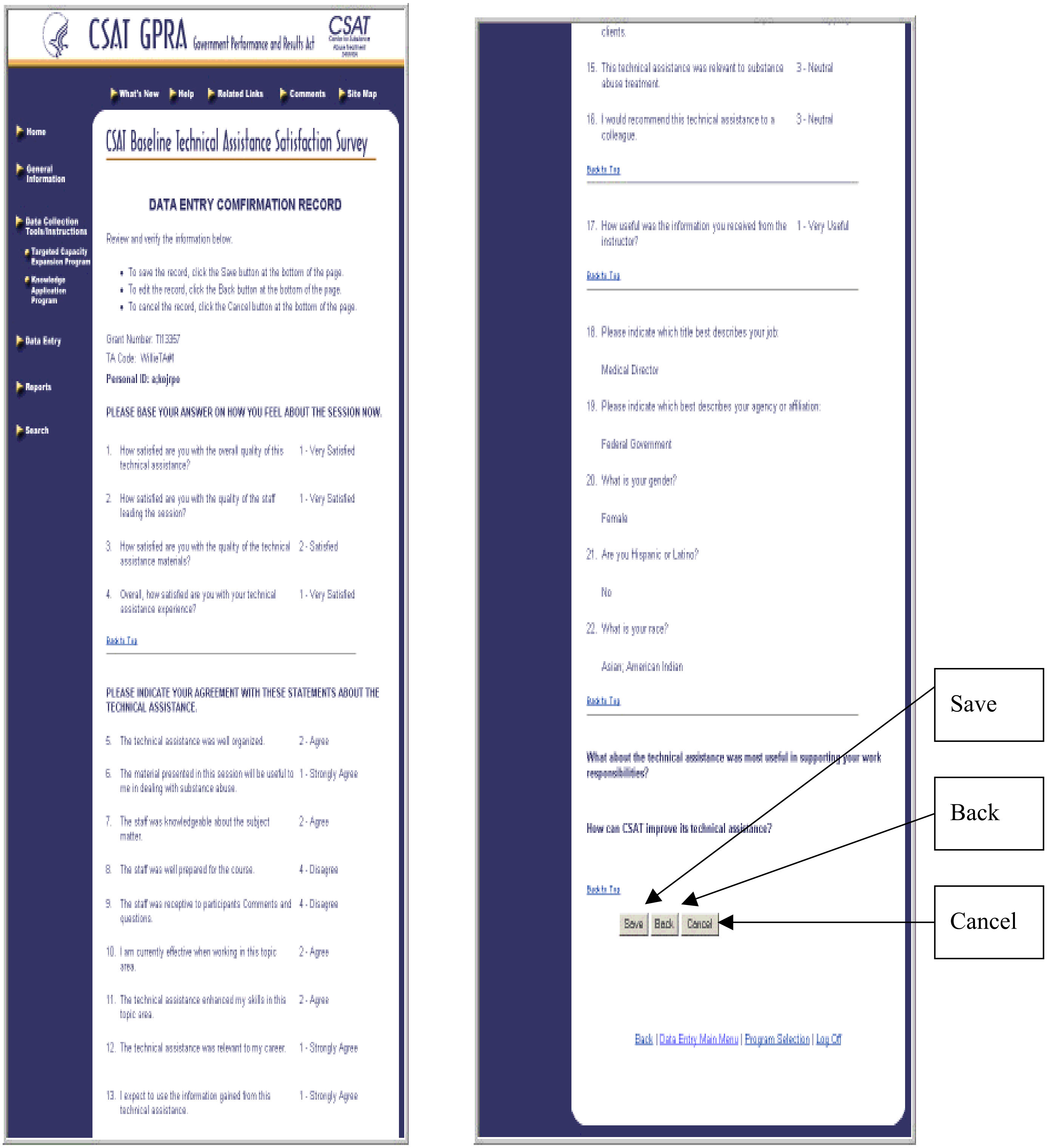
Note: You can access the instructions for completing KA forms under the Data Collection Tools section of the public GPRA Web site.

Step 8. Click the "Save" button to save the record. The **DATA ENTRY CONFIRMATION RECORD** page displays.

Step 8a. Click the "Undo" button to delete the information entered in the record.

Step 8b. Click the "Cancel" button to exit the survey and return to the **DATA ENTRY MAIN MENU – KA TOOLS** page.

Figure 3-30 – Data Entry Confirmation Record Page



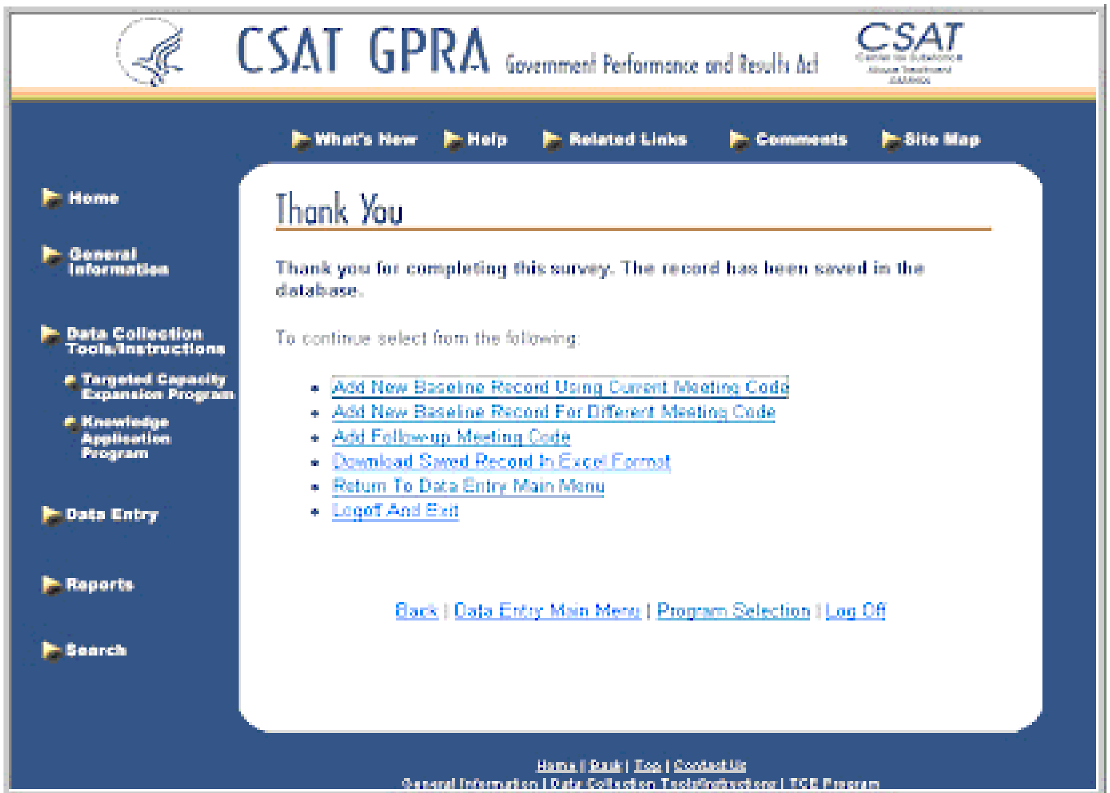
Step 9. Review the entered information.

Step 10. Click the "Save" button to save the record. The **THANK YOU** page displays.

Step 10a Click the "Undo" button to delete the information entered in the record.

Step 10b. Click the "Cancel" button to exit the survey and return to the **DATA ENTRY MAIN MENU – KA TOOLS** page.

Figure 3-31 – Thank You Page



Step 11. Click the Add New Baseline Record Using Current Training Code link to enter a new baseline using the current meeting code.

Step 11a. Click the Add New Baseline Record For Different Training Code link to enter a new baseline record for a different meeting code.

Step 11b. Click the Add a Follow-up Training Code link to enter a follow-up survey for the same meeting code.

Step 11c. To download a saved record in Excel format, click the Download saved record in Excel format link.

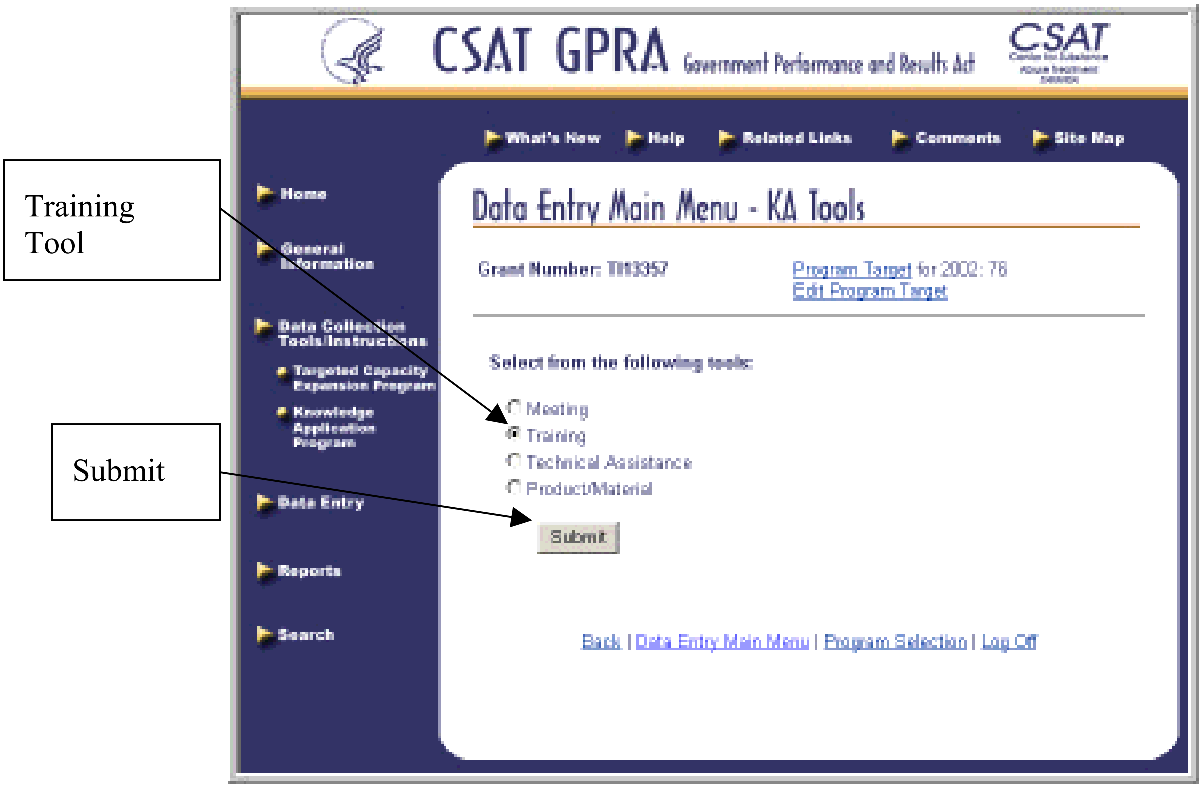
Step 11d. To return to the **DATA ENTRY MAIN MENU – KA TOOLS** page, click the Return to data entry main menu link.

Step 11e. To exit the session and log off of the System, click the Logoff and exit link.

Viewing or Editing an Existing Training Baseline or Follow-up Record

To view or edit an existing training baseline or follow-up survey, go to the **DATA ENTRY MAIN MENU – KA TOOLS** page, and complete the following steps.

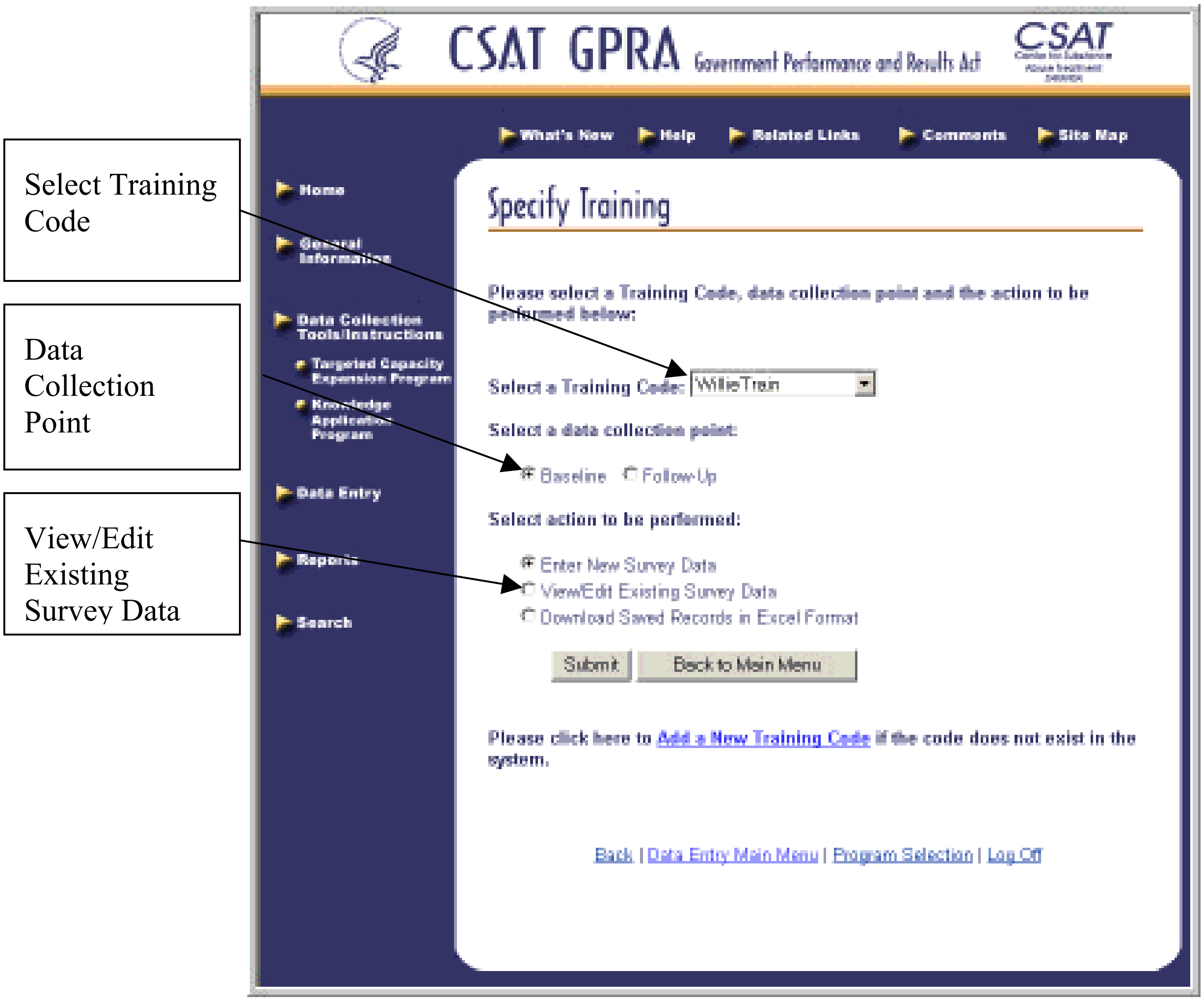
Figure 3-32 – Data Entry Main Menu – KA Tools Page



Step 1. Select the Training tool.

Step 2. Click the "Submit" button. The **SPECIFY TRAINING** page displays**.**

Figure 3-33 – Specify Training Page



Step 3. Select the type (baseline or follow-up) of survey you wish to view or edit. A second **SPECIFY TRAINING** page displays.

Figure 3-34 – Specify Training Page

Step 4. Select the type (baseline or follow-up) of survey you wish to view or edit. The completed **BASELINE/FOLLOW-UP TRAINING SATISFACTION SURVEY** page displays.

Note: You also have the choice of adding a new baseline survey by clicking on the Add New Baseline Survey link at the bottom of the page.

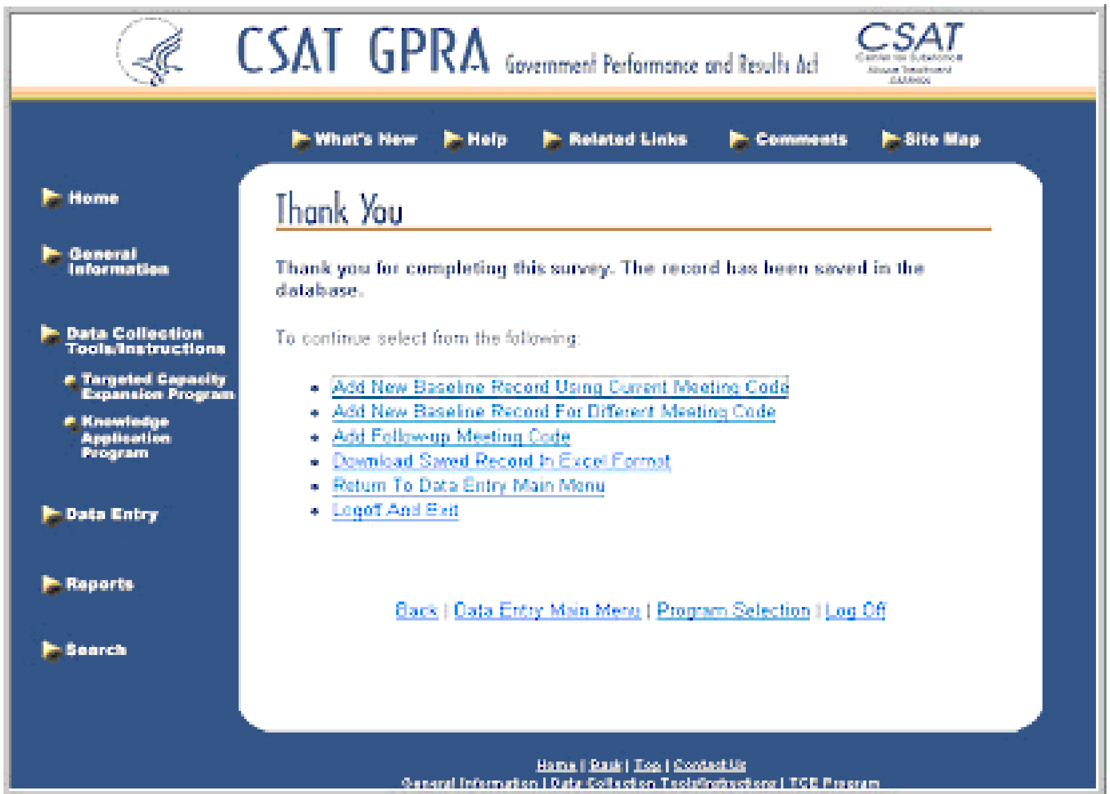
Step 5. Review the saved data, or complete the desired edits.

Step 6. Click the "Save" button. The **THANK YOU** page displays.

Step 6a. Click the "Undo" button to delete the information entered in the record.

Step 6b. If you click the "Cancel" button, all information in the survey will be lost. You will exit the survey and return to the **DATA ENTRY MAIN MENU – KA TOOLS** page.

Figure 3-35 – Thank You Page



Step 7. Click the Add New Baseline Record Using Current Training Code link to enter a new baseline using the current meeting code.

Step 7a. Click the Add New Baseline Record For Different Training Code link to enter a new baseline record for a different meeting code.

Step 7b. Click the Add a Follow-up Training Code link to enter a follow-up survey for the same meeting code.

Step 7c. To download a saved record in Excel format, click the Download saved record in Excel format link.

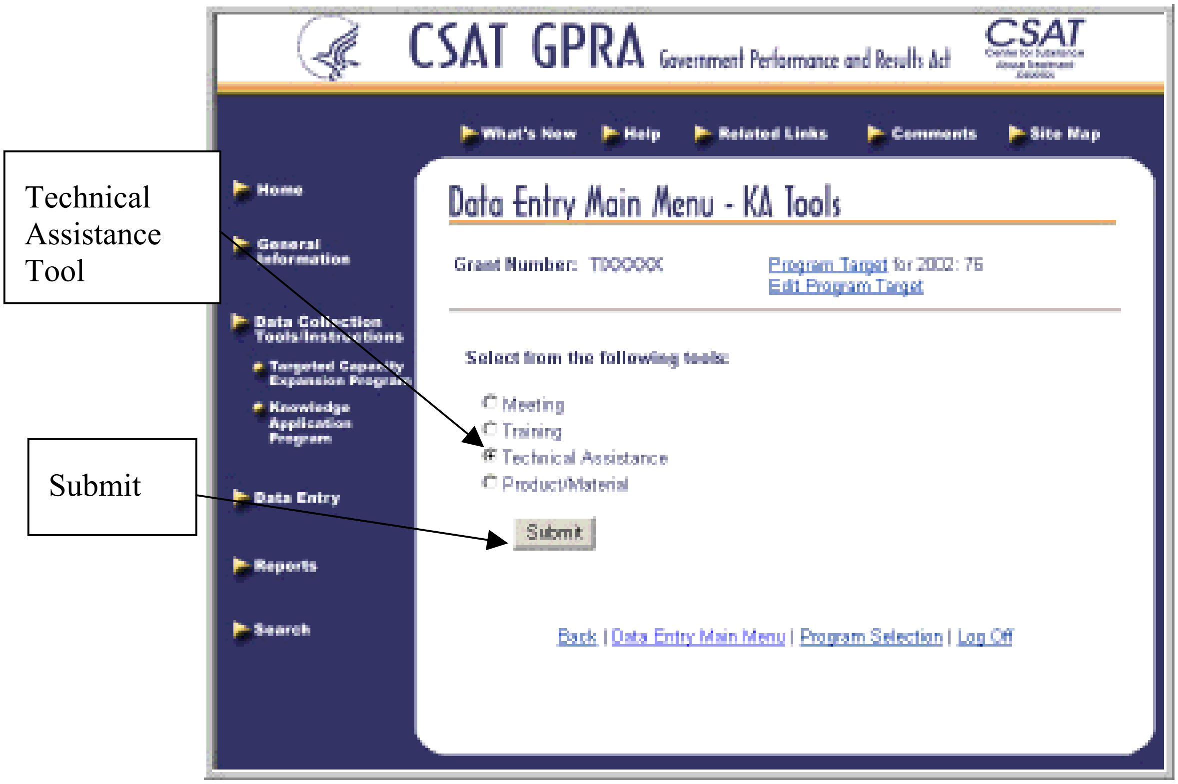
Step 7d. To return to the **DATA ENTRY MAIN MENU – KA TOOLS** page, click the Return to data entry main menu link.

Step 7e. To exit the session and log off of the System, click the Logoff and exit link.

Entering a New Technical Assistance Baseline Survey

To enter a new technical assistance baseline survey, go to the **DATA ENTRY MAIN MENU – KA TOOLS** page, and complete the following steps.

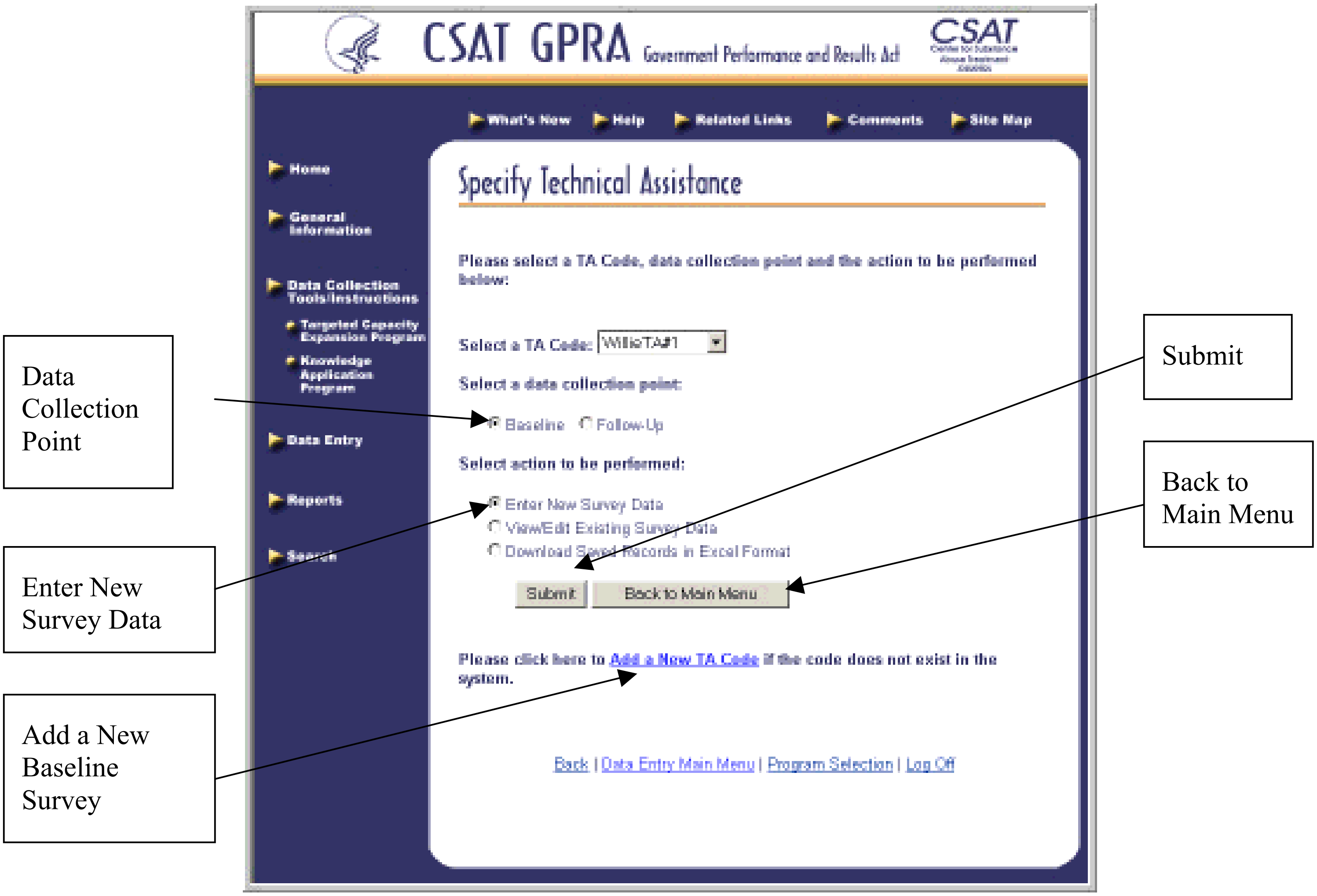
Figure 3-36 – Data Entry Main Menu – KA Tools Page



Step 1. Select the Technical Assistance tool.

Step 2. Click the "Submit" button. The **SPECIFY TECHNICAL ASSISTANCE** page displays.

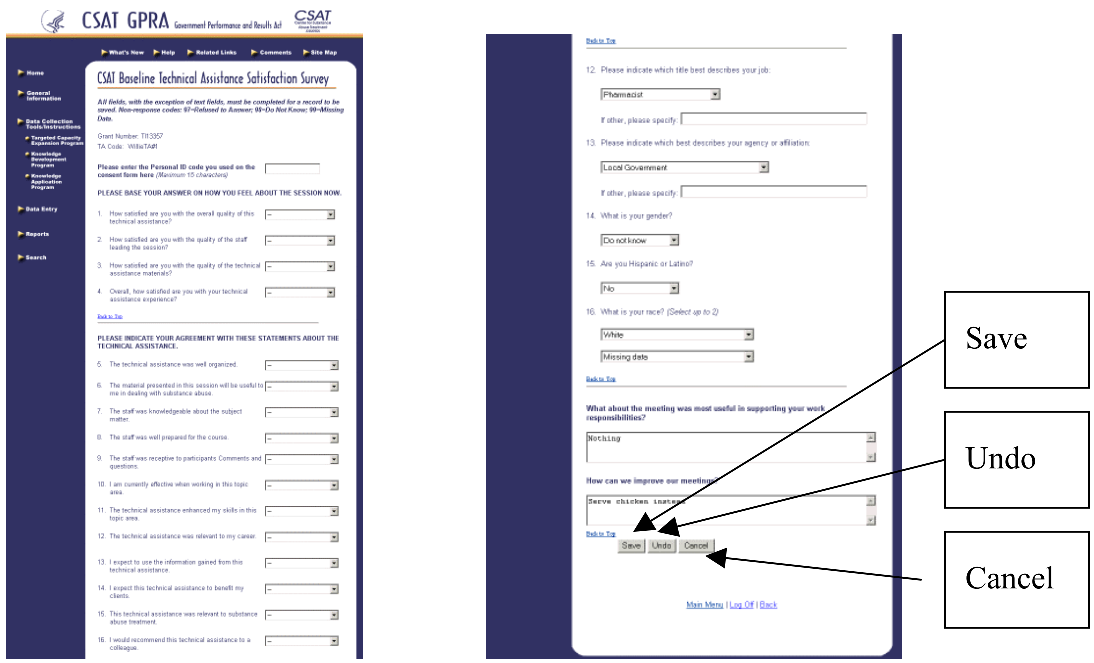
Figure 3-37 – Specify Technical Assistance Page



Step 3. Select baseline. The **BASELINE TECHNICAL ASSISTANCE SATISFACTION SURVEY** page displays.

Note: You also have the choice of adding a new baseline survey. To add a new baseline survey, click the Add New Baseline Survey link at the bottom of the page.

Figure-3-38 – Baseline Technical Assistance Survey Page



Step4. Complete the survey. The following rules apply when entering a new client record:

- All fields, except text fields, must be filled before the System will advance to the next section
- The cursor will not automatically advance to the next field.
- The TAB button on the keyboard will advance the curser to the next blank field.
- Do not enter commas, decimals, or symbols in any field.
- Non-response codes for these questions are: 97=Refused to Answer; 98=Do Not Know; 99=Missing Data.

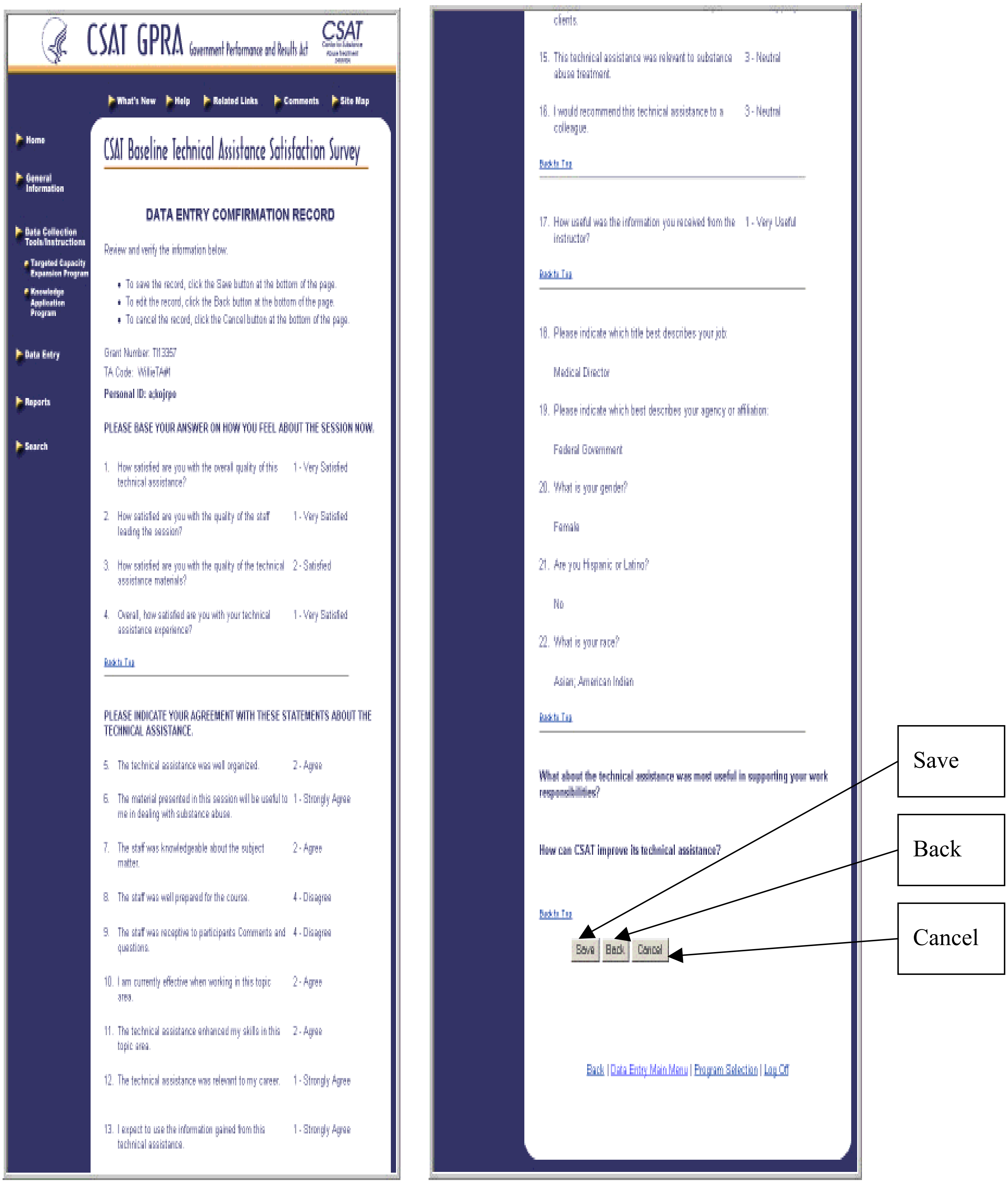
Note: You can access instructions for completing KA forms under the Data Collection Tools section of the public GPRA Web site.

Step 5. Click the "Save" button to save the record. The **DATA ENTRY CONFIRMATION RECORD** page displays.

Step 5a Click the "Undo" button to delete the information entered in the record.

Step 5b. Click the "Cancel" button to exit the survey and return to the **DATA ENTRY MAIN MENU – KA TOOLS** page.

Figure 3-39 – Data Entry Confirmation Record Page



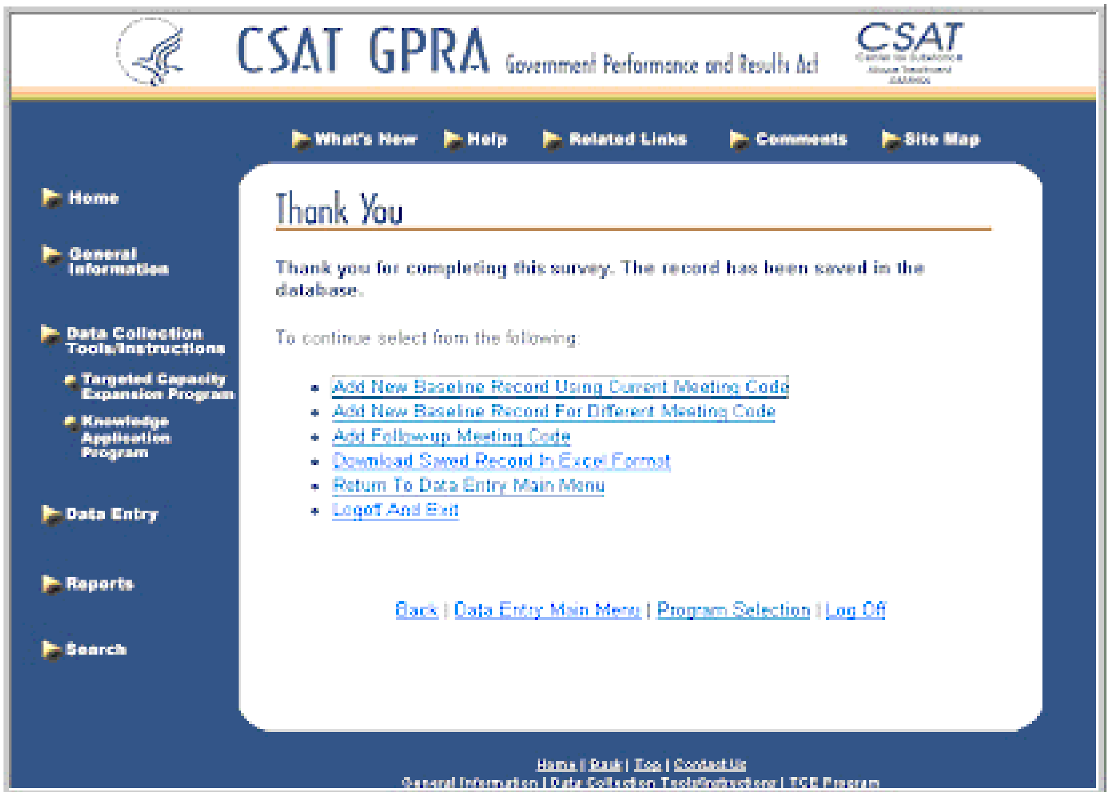
Step 6. Review the entered information.

Step 7. Click the "Save" button to save the record. The **THANK YOU** page displays.

Step7a Click the "Undo" button to delete the information entered in the record.

Step 7b. Click the "Cancel" button to exit the survey and return to the **DATA ENTRY MAIN MENU – KA TOOLS page.**

Figure 3-40 – Thank You Page



Step 8. Click the Add New Baseline Record Using Current Technical Assistance Code link to enter a new baseline using the current meeting code.

Step 8a. Click the Add New Baseline Record For Different Technical Assistance Code link to enter a new baseline record for a different meeting code.

Step 8b. Click the Add a Follow-up Technical Assistance Code link to enter a follow-up survey for the same meeting code.

Step 8b. Click the Add Follow-up Meeting Code link to enter a follow-up survey for the same meeting code.

Step 8c. To download a saved record in Excel format, click the Download saved record in Excel format link.

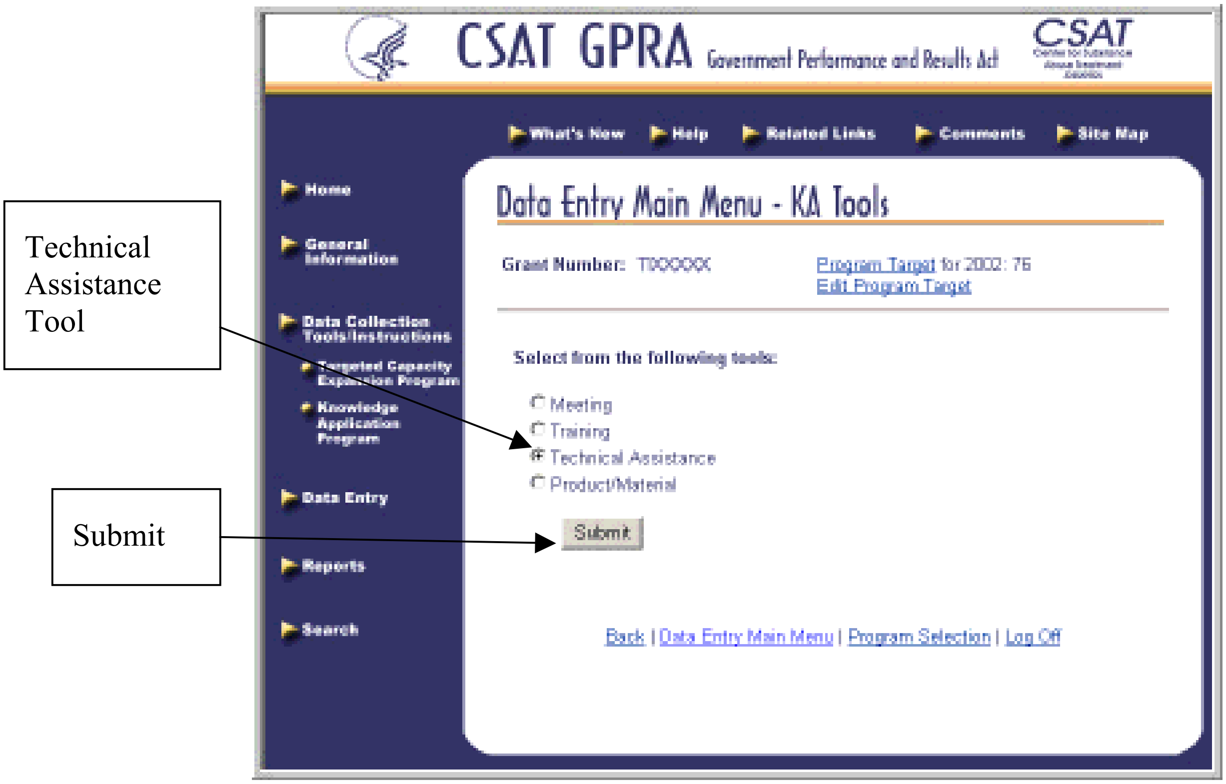
Step 8d. To return to the **DATA ENTRY MAIN MENU – KA TOOLS** page, click the Return to data entry main menu link.

Step 8e. To exit the session and log off of the System, click the Logoff and exit link.

Entering a New Technical Assistance Follow-up Survey

To enter a new technical assistance follow-up survey, go to the **DATA ENTRY MAIN MENU – KA TOOLS** page, and complete the following steps.

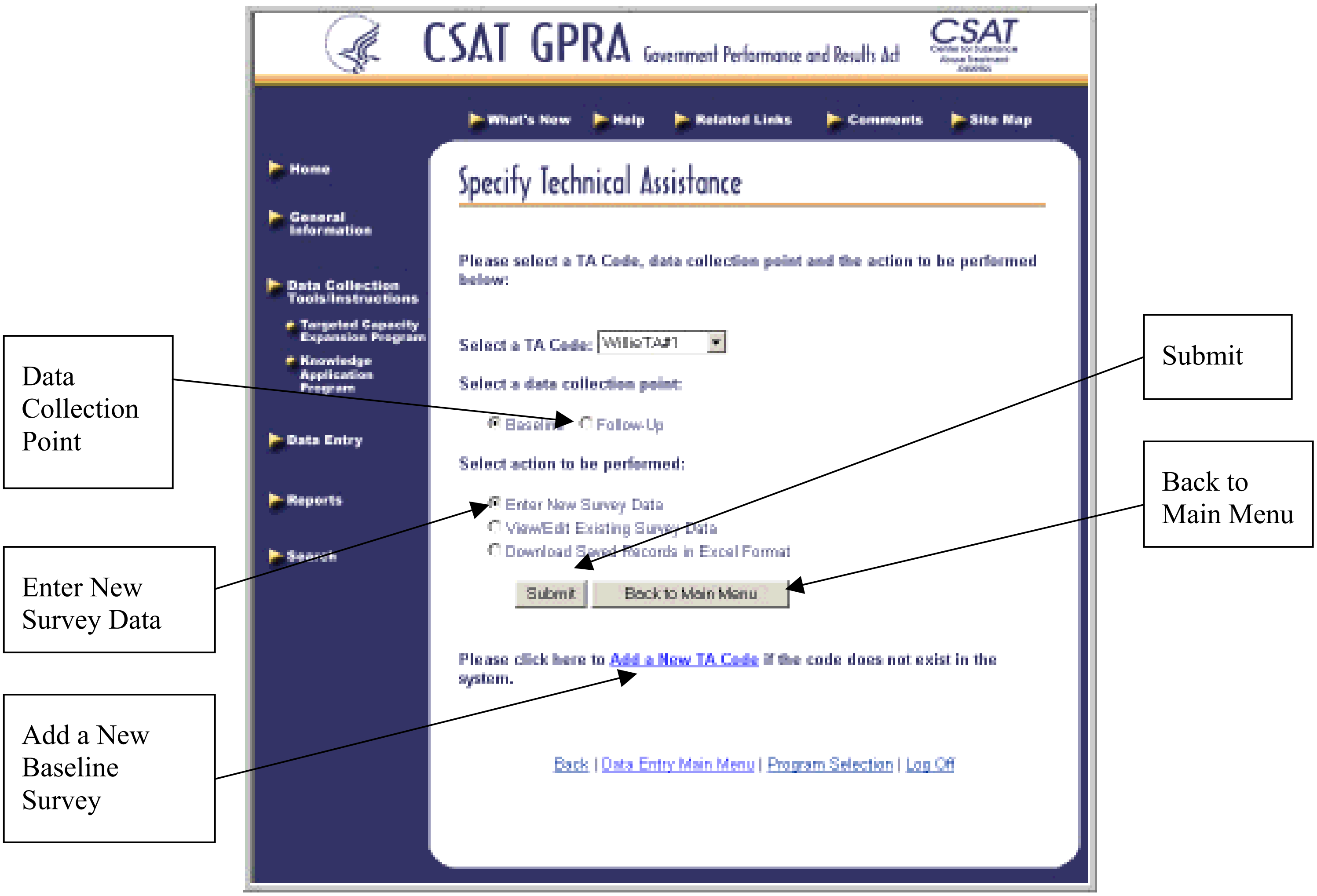
Figure 3-41 – Data Entry Main Menu – KA Tools Page



Step 1. Select the Technical Assistance tool.

Step 2. Click the "Submit" button. The **SPECIFY TECHNICAL ASSISTANCE** page displays.

Figure 3-42 – Specify Technical Assistance Page



Step 3. Select technical assistance code.

Step 4. Select "Follow-up" as the data collection point.

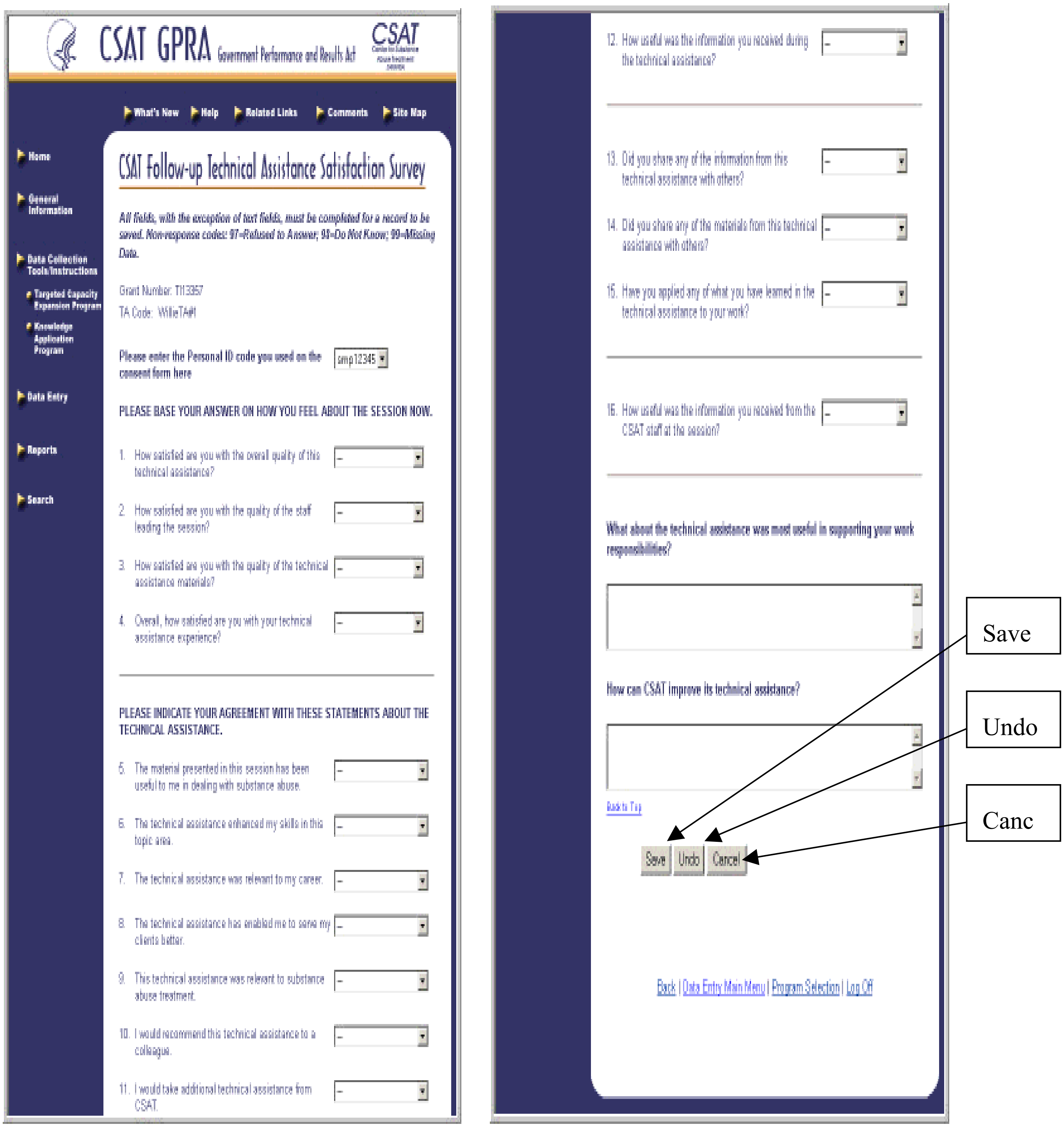
Step 5. Select "Enter New Survey Data" from the action list.

Step 6. Click the "Submit" button.

Step 6a. Click the "Back to Main Menu" button to return to the technical assistance main menu.

Note: You also have the choice of adding a new baseline survey by clicking on the Add New Baseline Survey link at the bottom of the page.

Figure-3-43 – Follow-up Technical Assistance Satisfaction Survey Page



Step 7. Complete the survey. The following rules apply when entering a new client record:

- All fields, except text fields, must be filled before the System will advance to the next section.

- The cursor will not automatically advance to the next field.
- The TAB button on the keyboard will advance the curser to the next blank field.
- Do not enter commas, decimals, or symbols in any field.
- Non-response codes for these questions are: 97=Refused to Answer; 98=Do Not Know; 99=Missing Data.

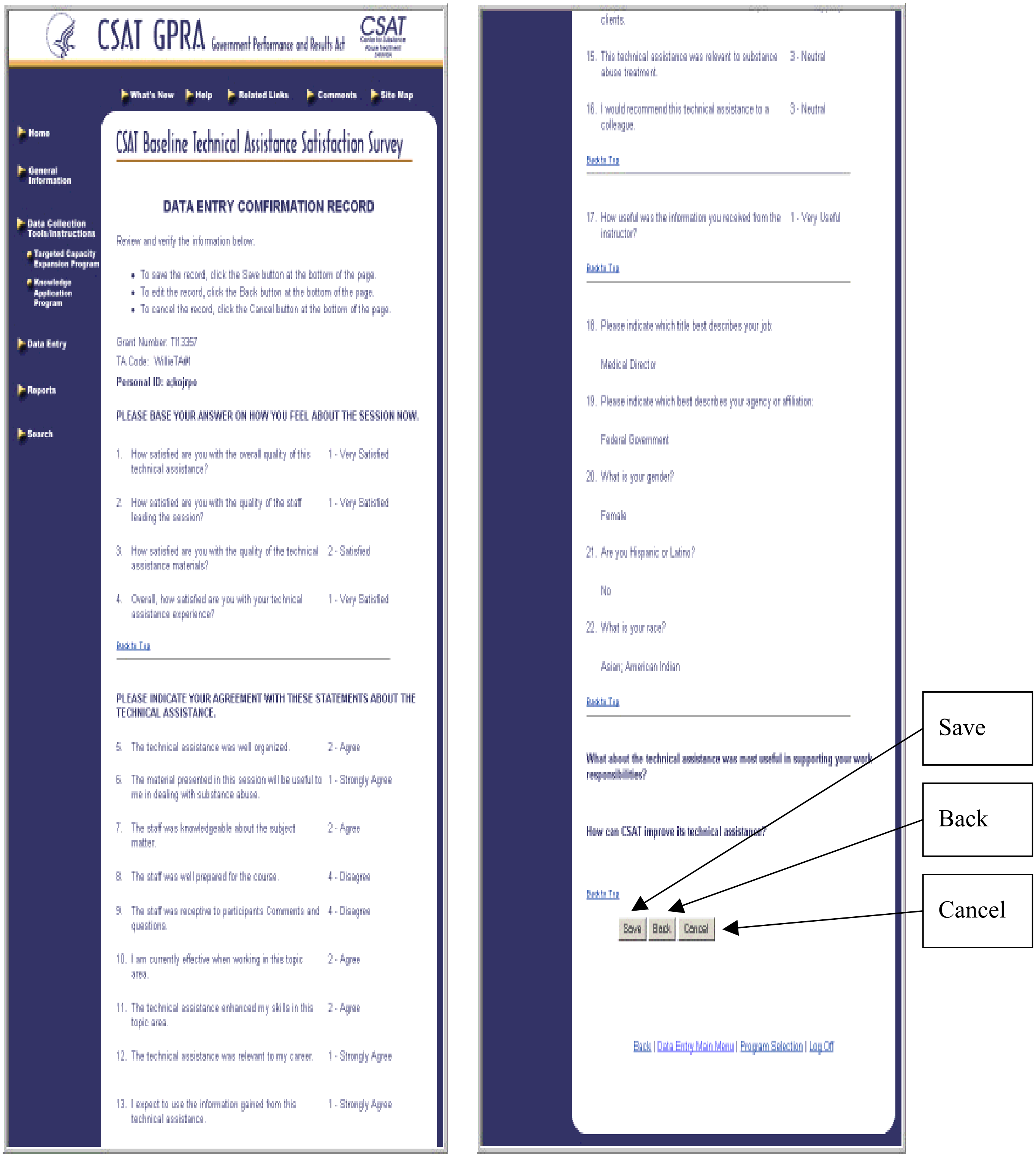
Note: You can access instructions for completing KA forms under the Data Collection Tools section of the public GPRA Web site.

Step 8. Click the "Save" button to save the record. The **DATA ENTRY CONFIRMATION RECORD** page displays.

Step 8a. Click the "Undo" button to delete the information entered in the record.

Step 8b. Click the "Cancel" button to exit the survey and return to the main menu

Figure 3-44 – Data Entry Confirmation Record Page



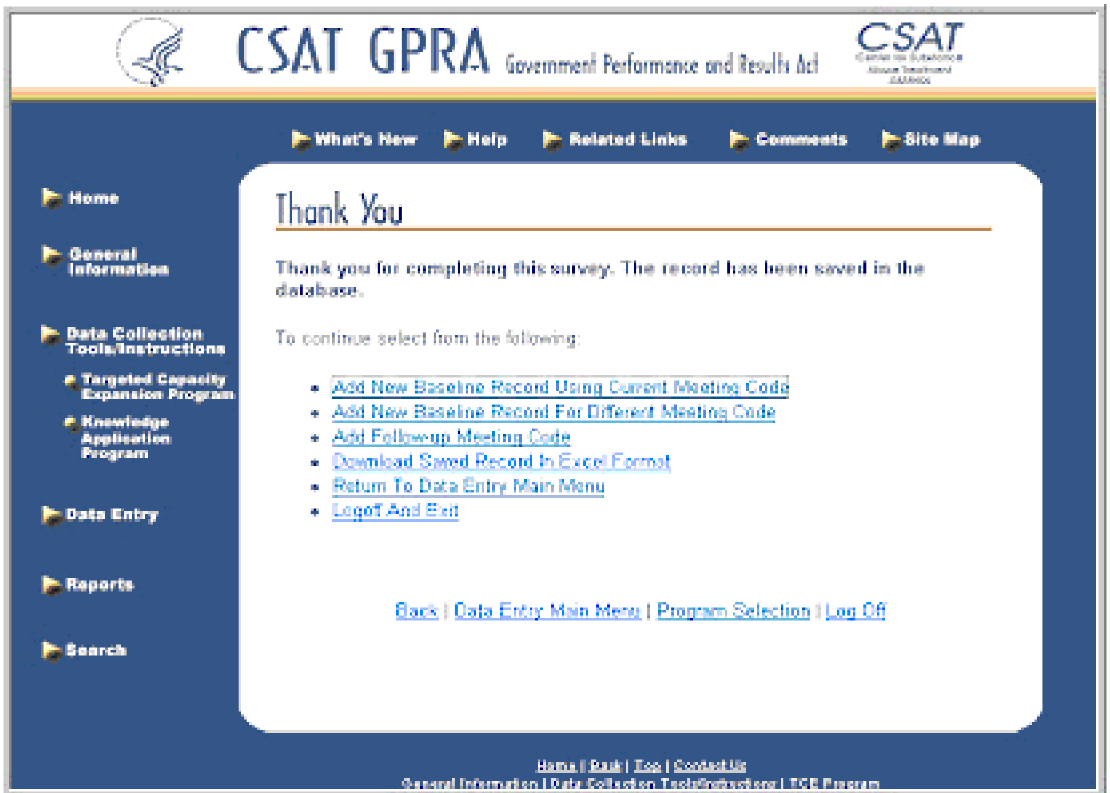
Step 9. Review the entered information.

Step 10. Click the "Save" button to save the record. The **THANK YOU** page displays.

Step 10a. Click the "Undo" button to delete the information entered in the record.

Step 10b. Click the "Cancel" button to exit the form and return to the main menu.

Figure 3-45 – Thank You Page



Step 11. Click the Add New Baseline Record Using Current Technical Assistance Code link to enter a new baseline using the current meeting code.

Step 11a. Click the Add New Baseline Record For Different Technical Assistance Code link to enter a new baseline record for a different meeting code.

Step 11b. Click the Add a Follow-up Technical Assistance Code link to enter a follow-up survey for the same meeting code.

Step 11c. To download a saved record in Excel format, click the Download saved record in Excel format link.

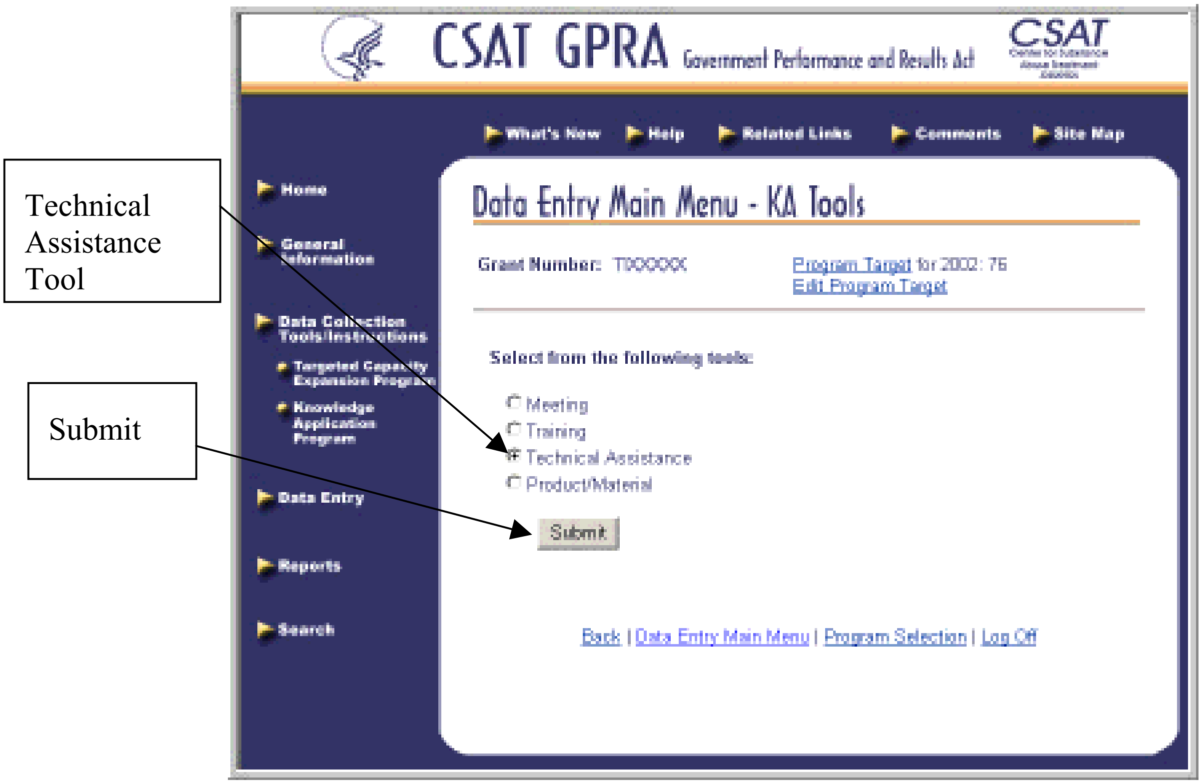
Step 11d. To return to the data entry main menu page, click the Return to data entry main menu link.

Step 11e. To exit the session and log off of the System, click the Logoff and exit link.

Viewing or Editing an Existing Technical Assistance Baseline or Follow-up Record

To view or edit an existing technical assistance baseline or follow-up survey, go to the **DATA ENTRY MAIN MENU – KA TOOLS** page, and complete the following steps.

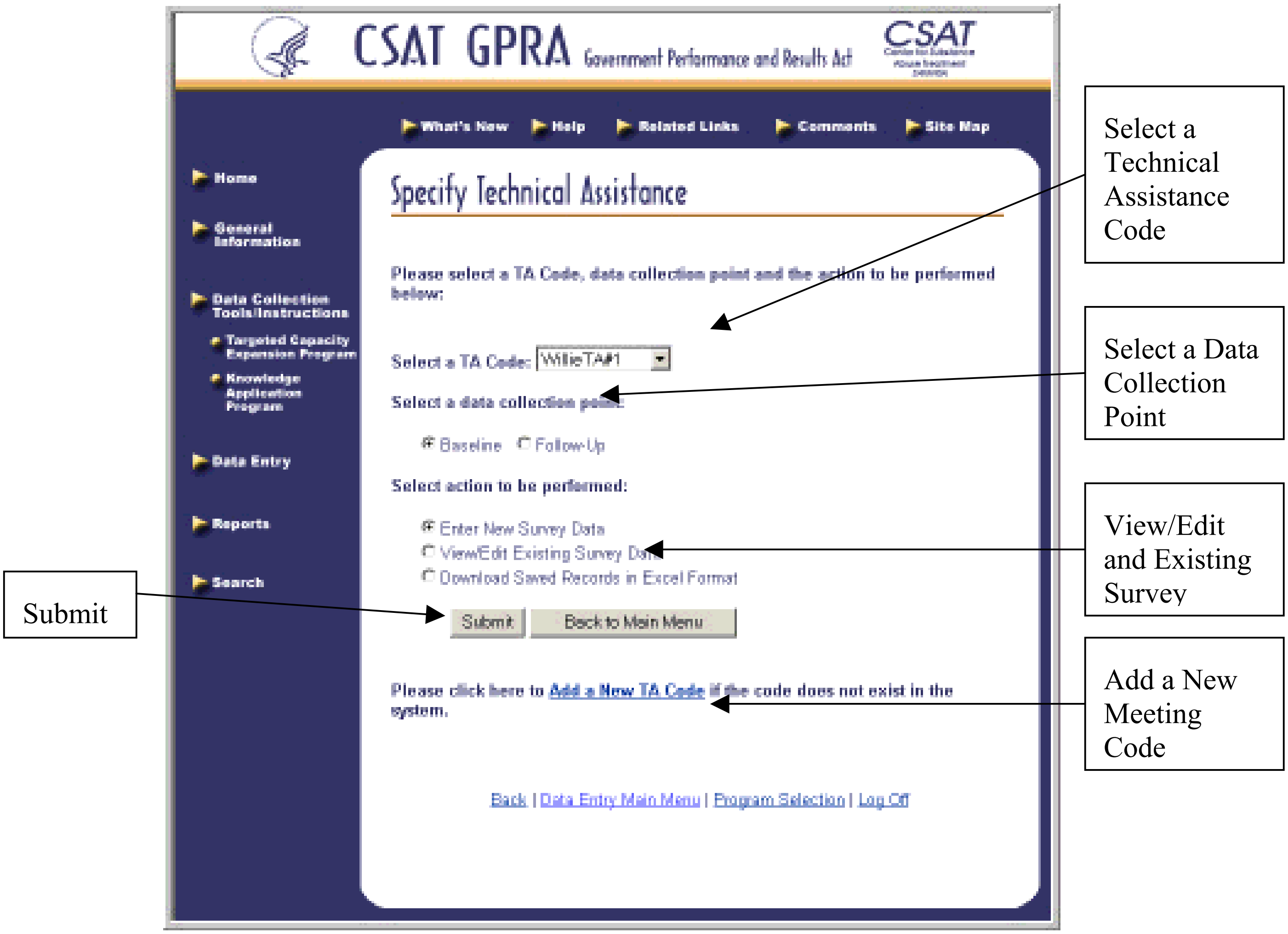
Figure 3-46 – Data Entry Main Menu – KA Tools Page



Step 1. Select the Technical Assistance tool.

Step 2. Click the "Submit" button. The **SPECIFY TECHNICAL ASSISTANCE** page displays.

Figure 3-47 – Specify Technical Assistance Page



Step 3 Select a technical assistance code.

Step 4. Select Baseline or Follow-up as the data collection point.

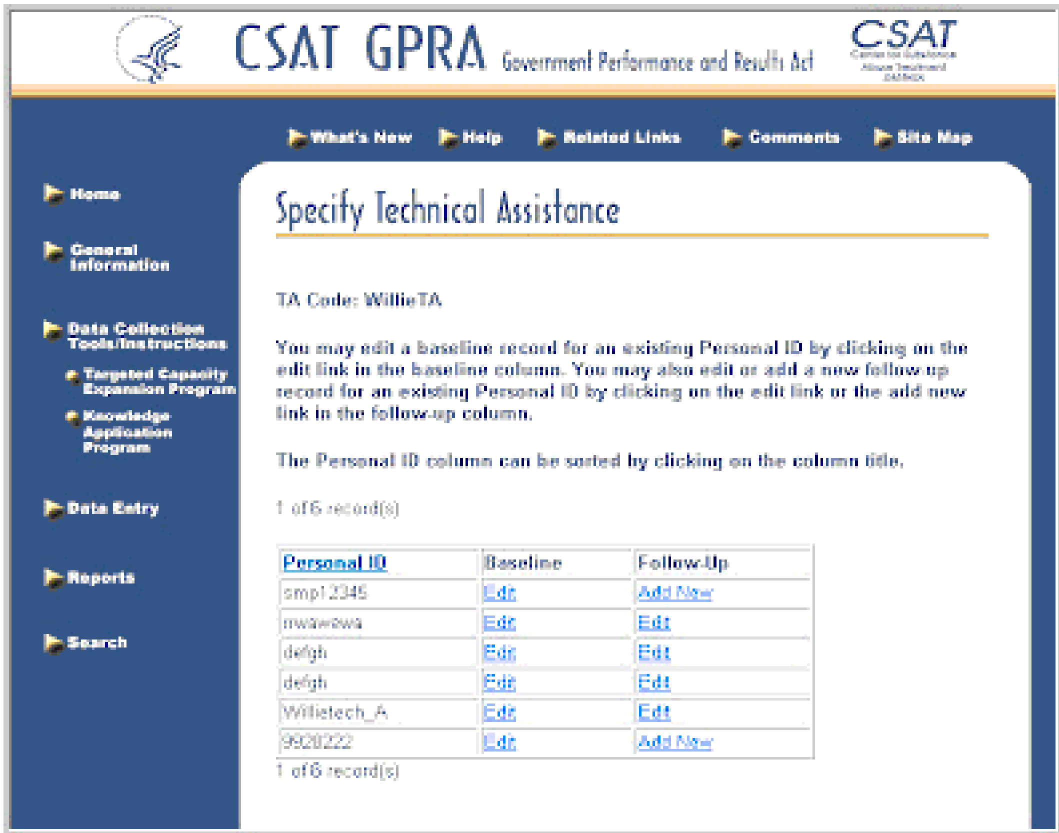
Step 5. Select "View/Edit New Survey Data" from the action list.

Step 6. Click the "Submit" button. A second **SPECIFY TECHNICAL ASSISTANCE** page displays.

Step 6a. Click the "Back to Main Menu" button to return to the technical assistance main menu.

Note: You also have the choice of adding a new baseline survey. To add a new baseline survey, click the Add a New TA Code link at the bottom of the page.

Figure 3-48 – Specify Technical Assistance Page



Step 7. Choose the grantee name.

Step 8. Click "Edit" or Follow-up." The completed **BASELINE/FOLLOW-UP MEETING SATISFACTION SURVEY** page displays.

Note: This page also contains the option of adding a new 6- or 12-month follow-up record if one does not exist in the System.

Note: You can also add a new baseline survey. To add a new baseline survey, click the Add New Baseline Survey link at the bottom of the page.

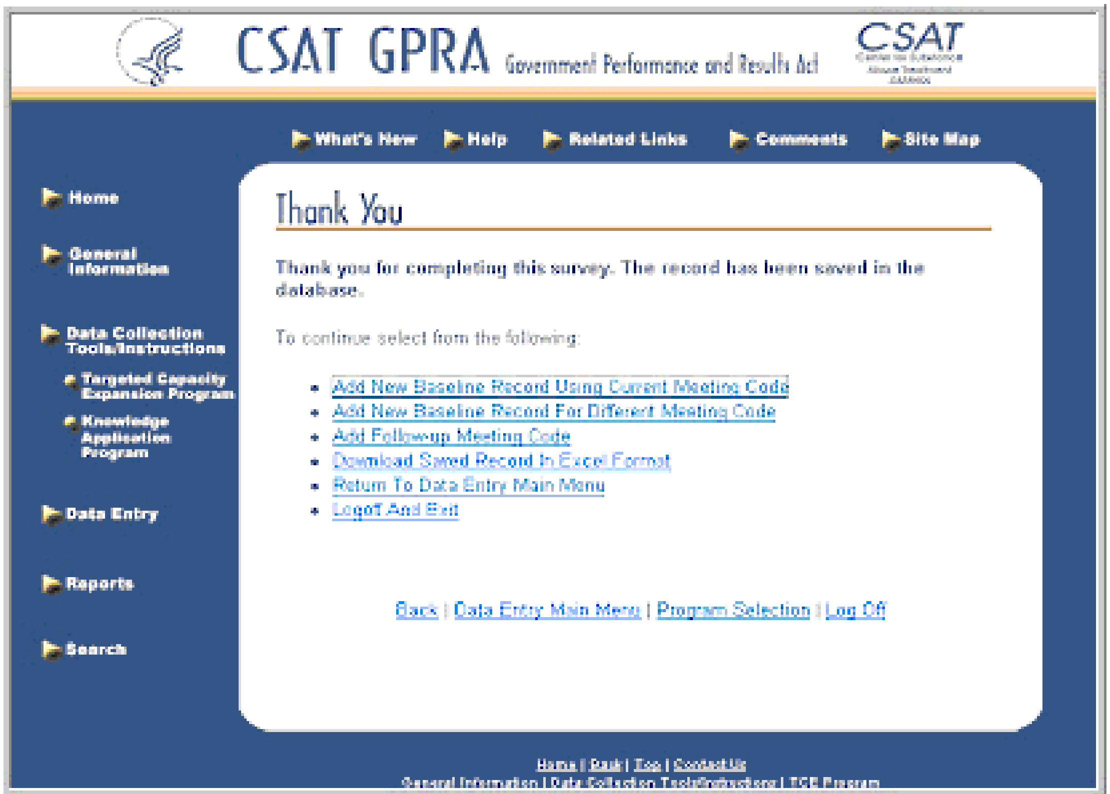
Step 9. Review the saved data, or complete the desired edits. The **THANK YOU** page displays.

Step 10. Click the "Save" button to save the record. The **THANK YOU** page displays.

Step10a. Click the "Undo" button to delete the information entered in the record.

Step 10b. Click the "Cancel" button to exit the survey and return to the main menu.

Figure 3-49 – Thank You Page



Step 11. Click the Add New Baseline Record Using Current Technical Assistance Code link to enter a new baseline using the current meeting code.

Step 11a. Click the Add New Baseline Record For Different Technical Assistance Code link to enter a new baseline record for a different meeting code.

Step 11b. Click the Add a Follow-up Technical Assistance Code link to enter a follow-up survey for the same meeting code.

Step 11c. To download a saved record in Excel format, click the Download saved record in Excel format link.

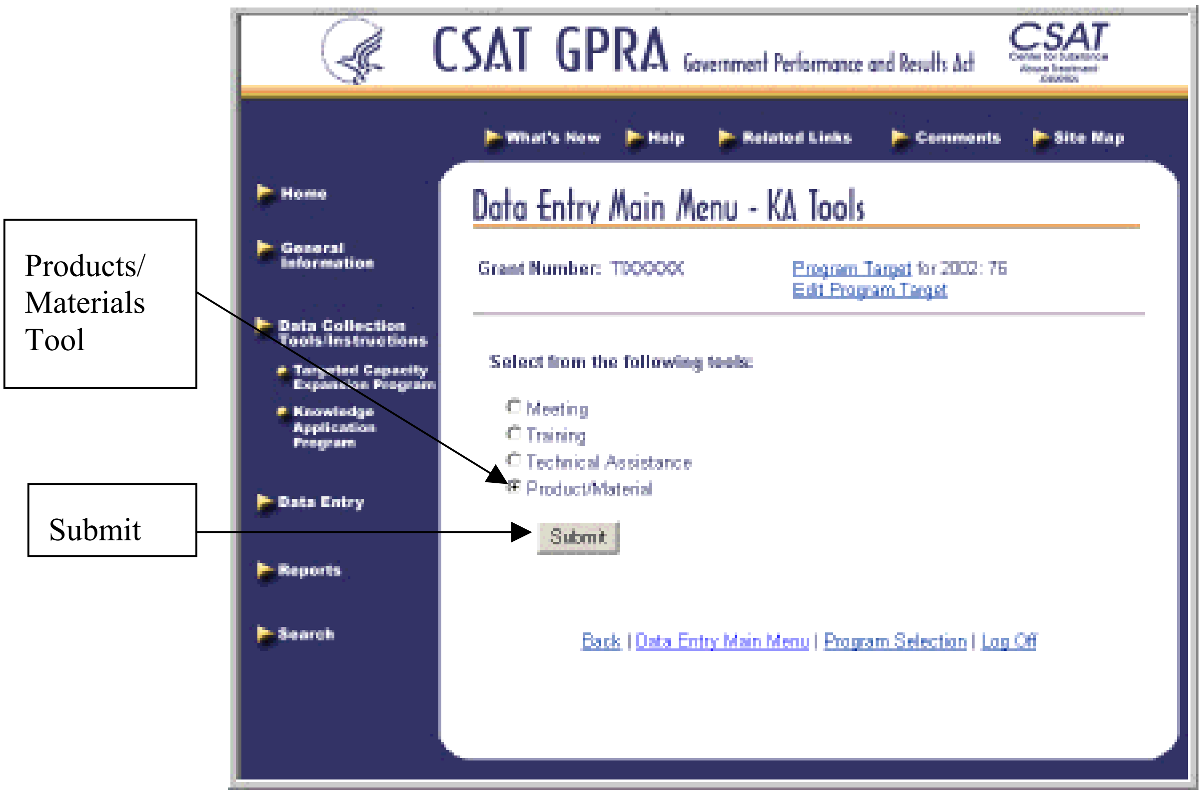
Step 11d. To return to the data entry main menu page, click the Return to data entry main menu link.

Step 11e. To exit the session and log off of the System, click the Logoff and exit link

Entering a New Product/Materials Survey

To enter a new Products/Materials Survey, go to the **DATA ENTRY MAIN MENU – KA TOOLS** page, and complete the following steps.

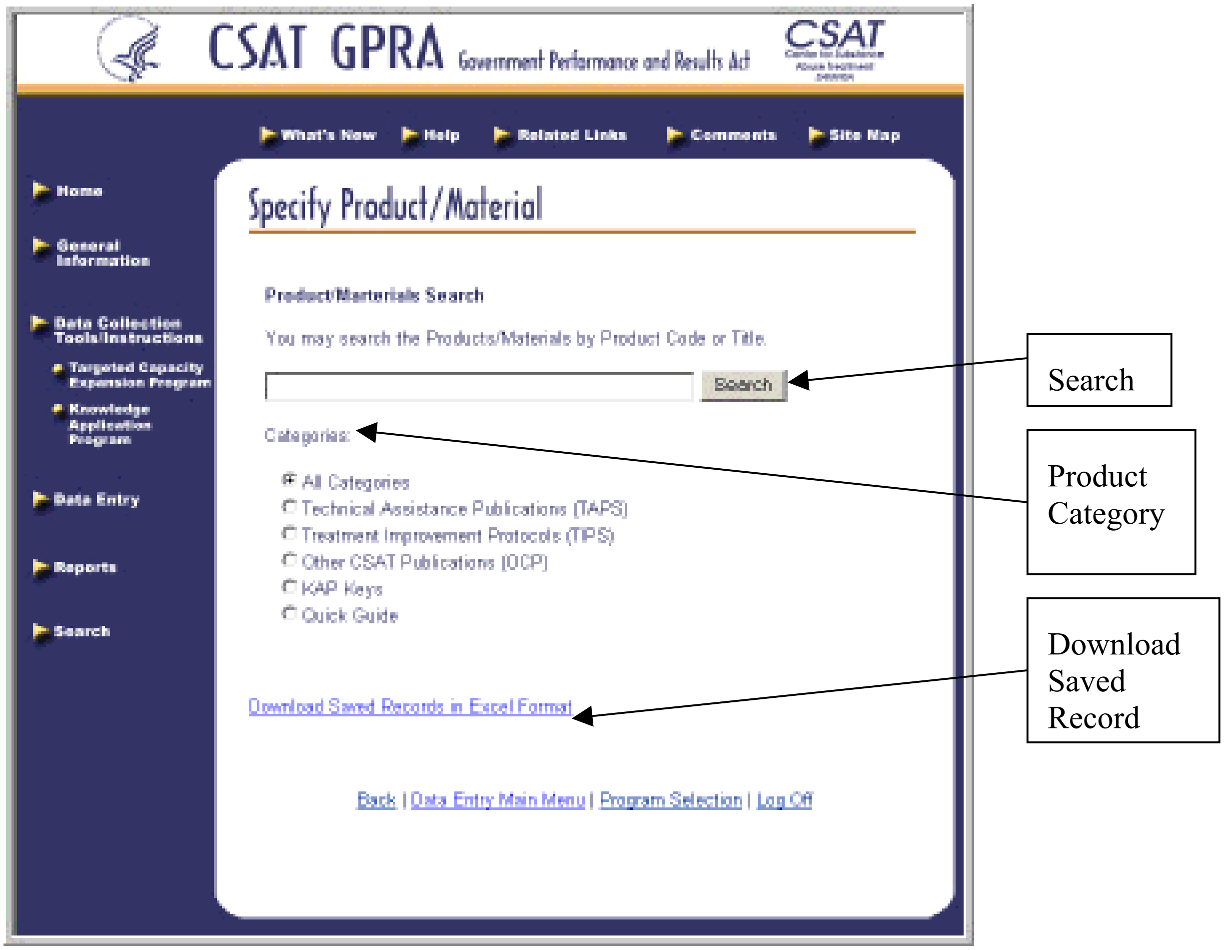
Figure 3-50 – Data Entry Main Menu – KA Tools Page



Step 1. Select the Products/Materials Tool.

Step 2. Click the "Submit" button. The **PRODUCT/MATERIALS SEARCH** page displays.

Figure 3-51 – Product/Materials Search, Specify Product/Material Page



Step 3. Choose a product.

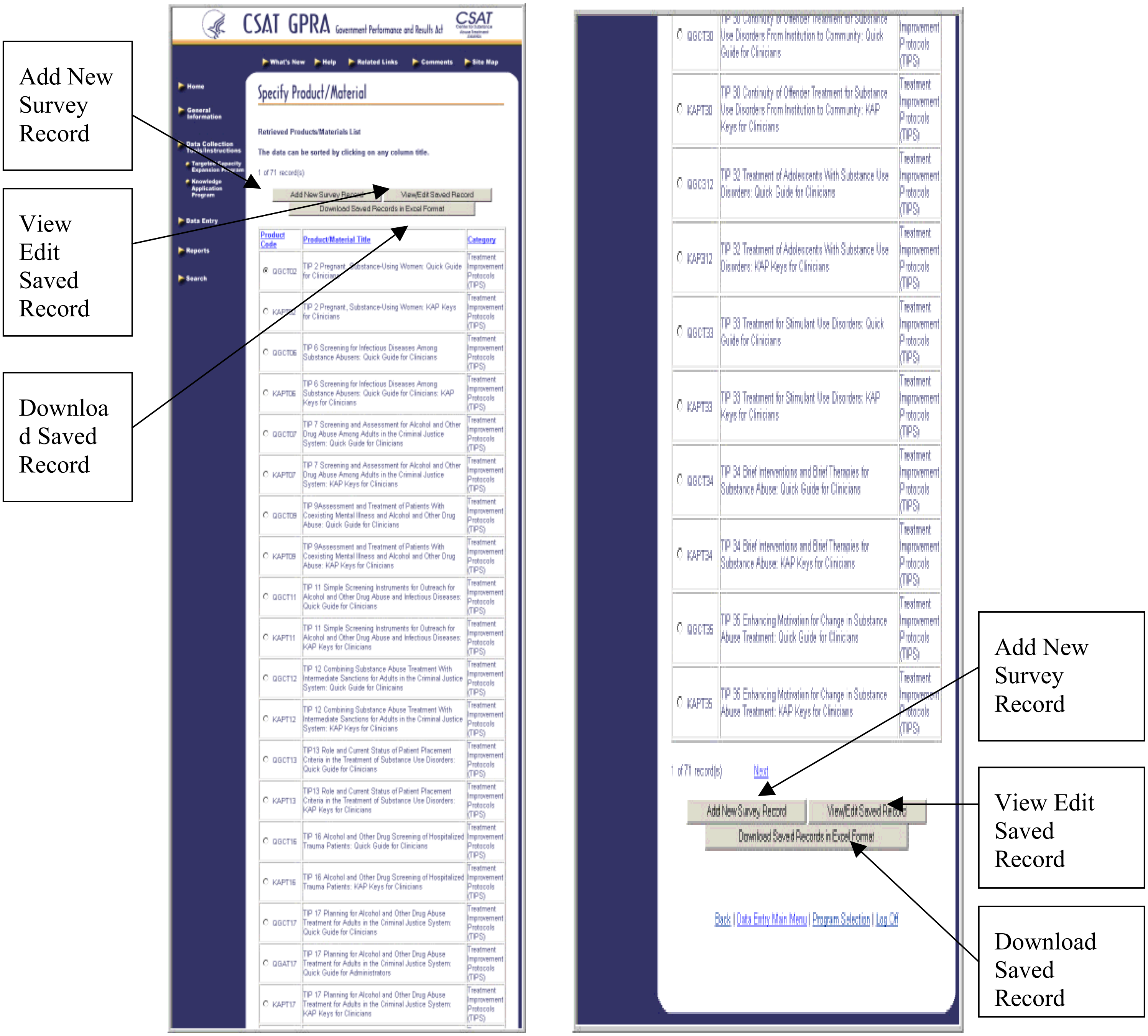
Step 4. Choose a product category.

Note: You can choose an individual category and the products/materials listed in that category display, or you can search all products/materials in the database by choosing "All Categories."

Note: You may also choose to download a saved products/materials record by clicking on the Download Saved Records in Excel Format link**.**

Step 5. Click the "Submit" button. The **SPECIFY PRODUCT/MATERIAL** page displays.

Figure 3-52 – Specify Product/Material Page



Step 6. Choose a product code.

Note: You may sort on the product code, product/material title, or product category fields.

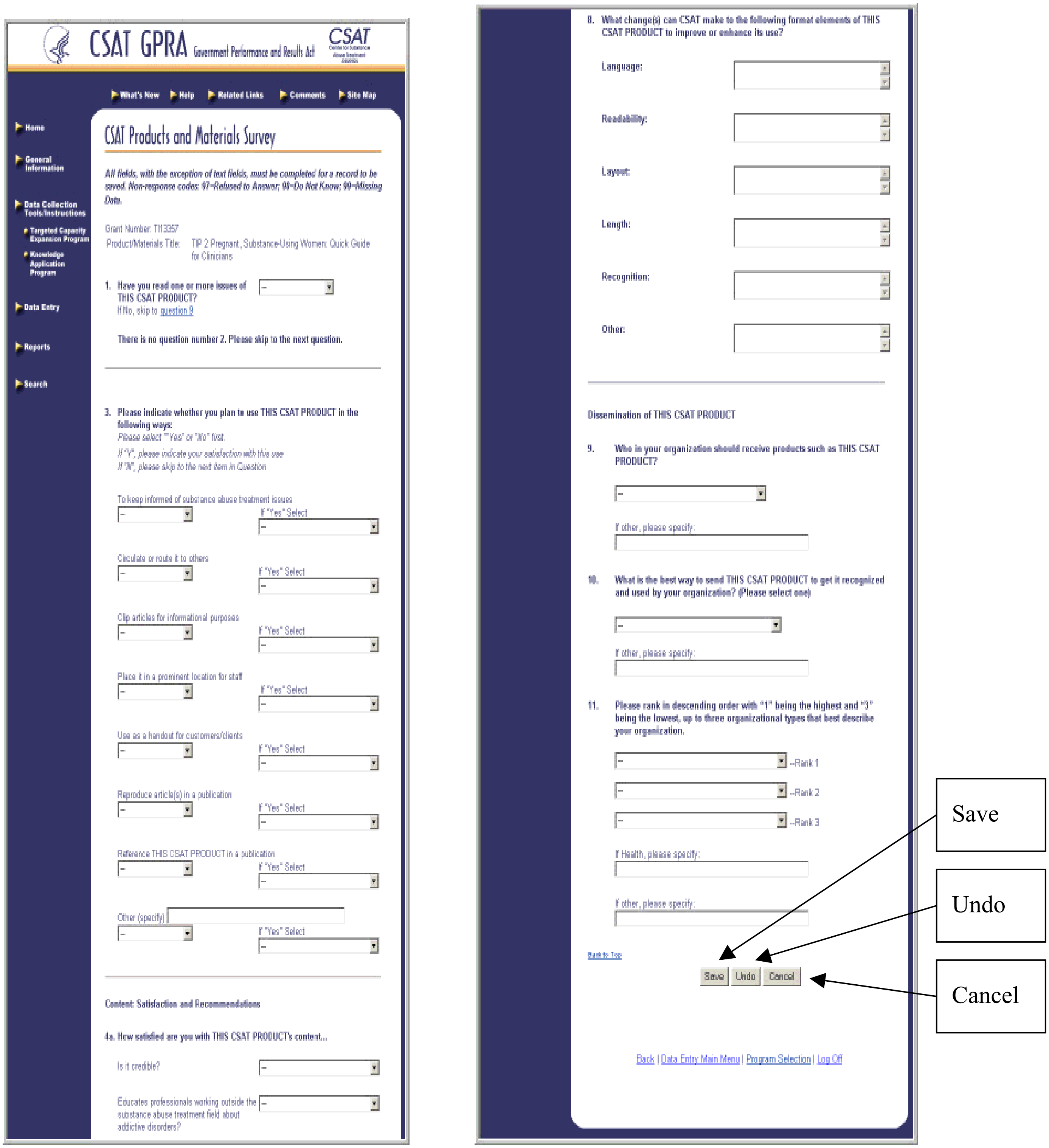
Step 7. Choose a product.

Step 8. Click the "Add New Survey Record" button. The **PRODUCTS AND MATERIALS SURVEY** page displays.

Note: You may view or edit an existing file by clicking on the "View/Edit Saved File" button.

Note: You may download saved records into Excel format by clicking on the "Download Saved Records in Excel Format" button.

Figure 3-53 – Products and Materials Survey Page



Step 9. Complete the survey. The following rules apply when entering a new client record:

- All fields, except text fields, must be filled before the System will advance to the next section
- The cursor will not automatically advance to the next field.
- The TAB button on the keyboard will advance the curser to the next blank field.
- Do not enter commas, decimals. or symbols in any field.
- Non-response codes for these questions are: 97=Refused to Answer; 98=Do Not Know; 99=Missing Data.

Note: You can access instructions for completing KA forms under the Data Collection Tools section of the public GPRA Web site.

Step 10. Click the "Save" button to save the record. The **DATA ENTRY CONFIRMATION ENTRY** page displays.

Step 10a. Click the "Undo" button to delete the information entered in the record.

Step 10b. Click the "Cancel" button to exit the survey and return to the main menu.

Figure 3-54 – Data Entry Confirmation Record Page

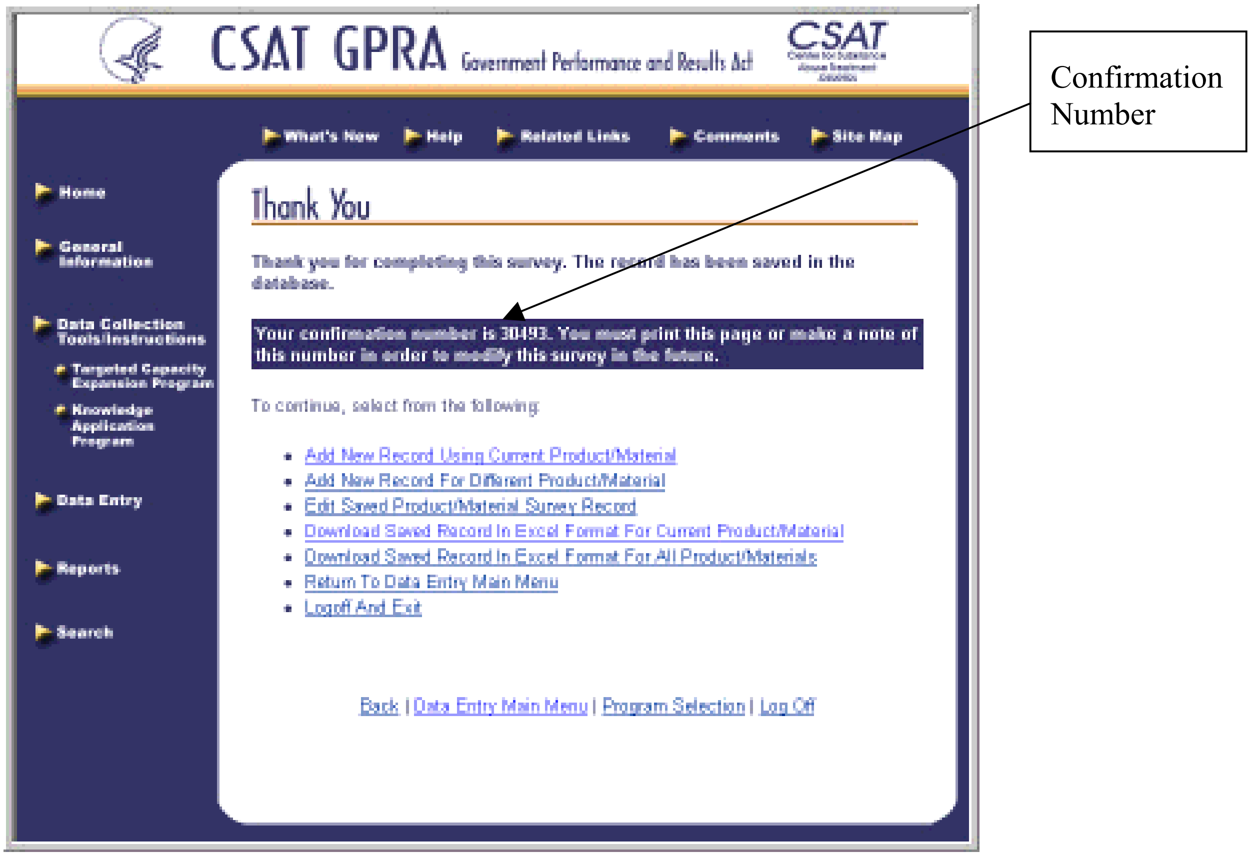
Step 11. Review the entered information.

Step 12. Click the "Save" button to save the record. The **THANK YOU** page displays.

Step12a. Click the "Undo" button to delete the information entered in the record.

Step 12b. Click the "Cancel" button to exit the form and return to the main menu.

Figure 3-55 – Thank You Page



Note: You will receive a confirmation number for the saved record. You must print this page or make a note of this number in order to modify this survey in the future.

Step 13. Click the Add New Record Using Current Product/Material link to enter a new product/materials survey for the same product or material.

Step 13a. Click the Add New Record For Different Product/Material link to enter a new product/materials survey for a different product or material.

Step 13b. Click the Edit Saved Product/Material Survey Record link to view or edit a saved product/material survey record. Remember you must have the confirmation number in order to view a saved products/materials record.

Step 13c. Click the Download Saved Record In Excel Format For Current Product/Material to download the current saved record in Excel format.

Step 13d. Click the Download Saved Record In Excel Format For All Product/Materials to download all saved records for the current grant number.

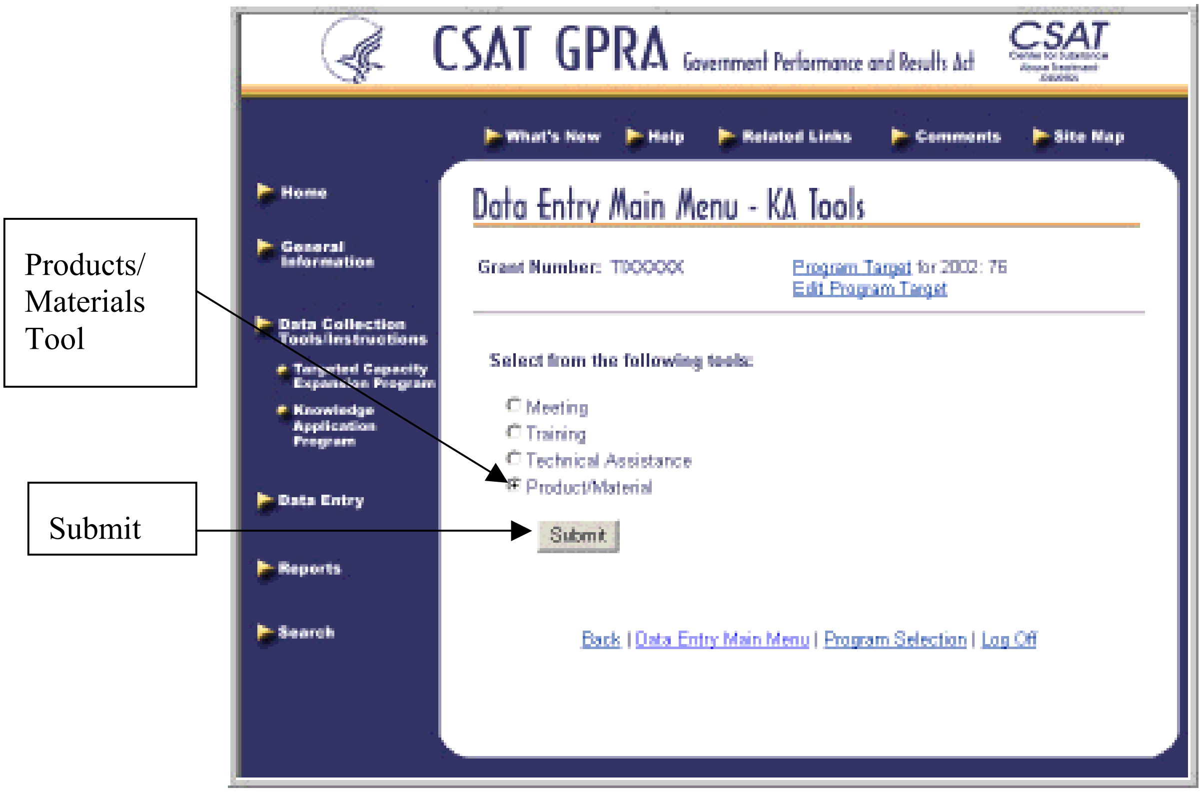
Step 13e. To return to the data entry main menu page, click the Return To Data Entry Main Menu link.

Step 14f. To exit the session and logoff the System, click the Logoff And Exit link.

Editing or Viewing a Saved Product/Materials Record

To view or edit a saved products/material record, you **must** have the confirmation number of the record you wish to view or edit. To view or edit a saved product/material record, go to the **DATA ENTRY MAIN MENU – KA TOOLS** page, and complete the following steps.

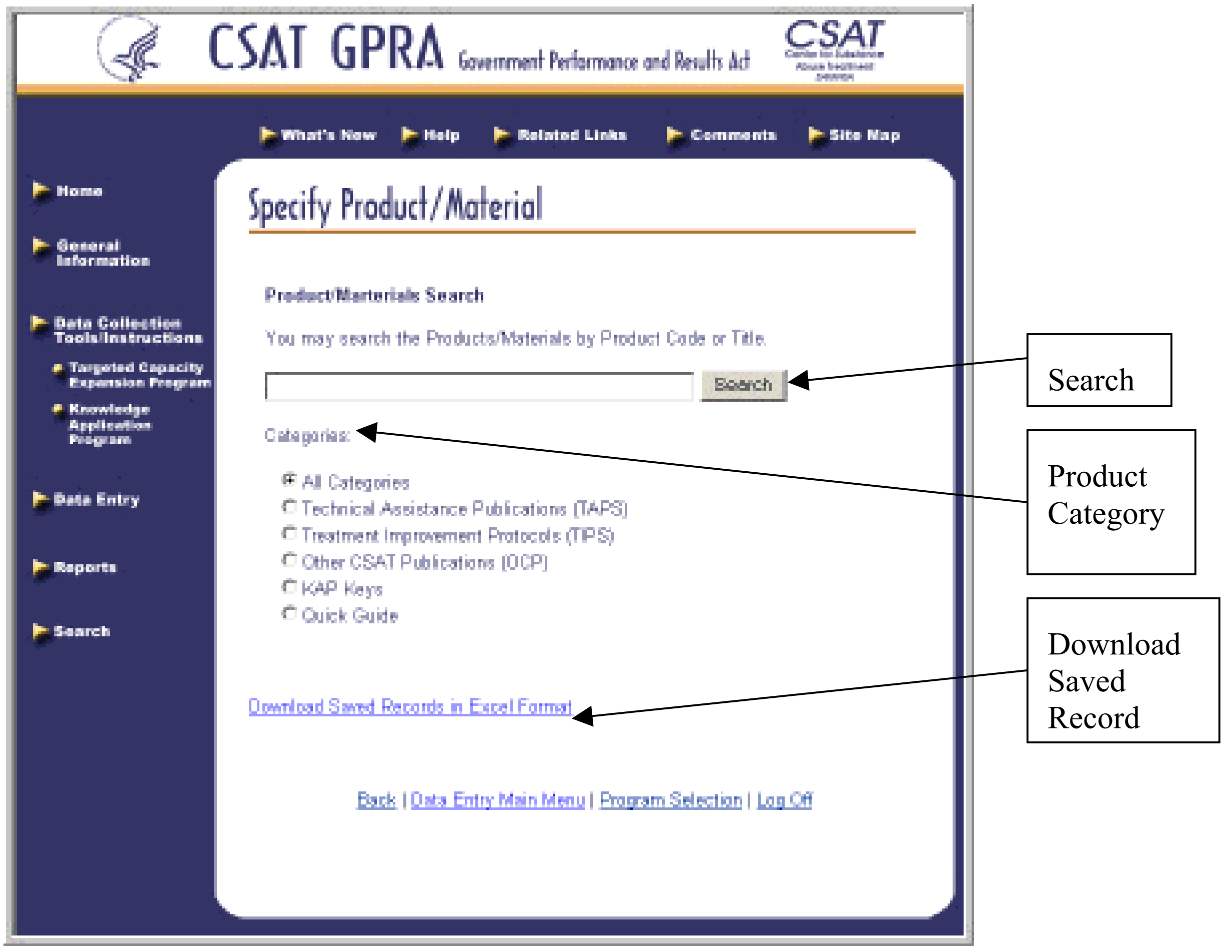
Figure 3-56 – Data Entry Main Menu – KA Tools Page



Step 1. Select the Products/Materials Tool.

***Step 2*.** Click the "Submit" button. The **SPECIFY PRODUCT/MATERIAL** page displays.

Figure 3-57 – Specify Product/Material Page



Step 3. Choose a product.

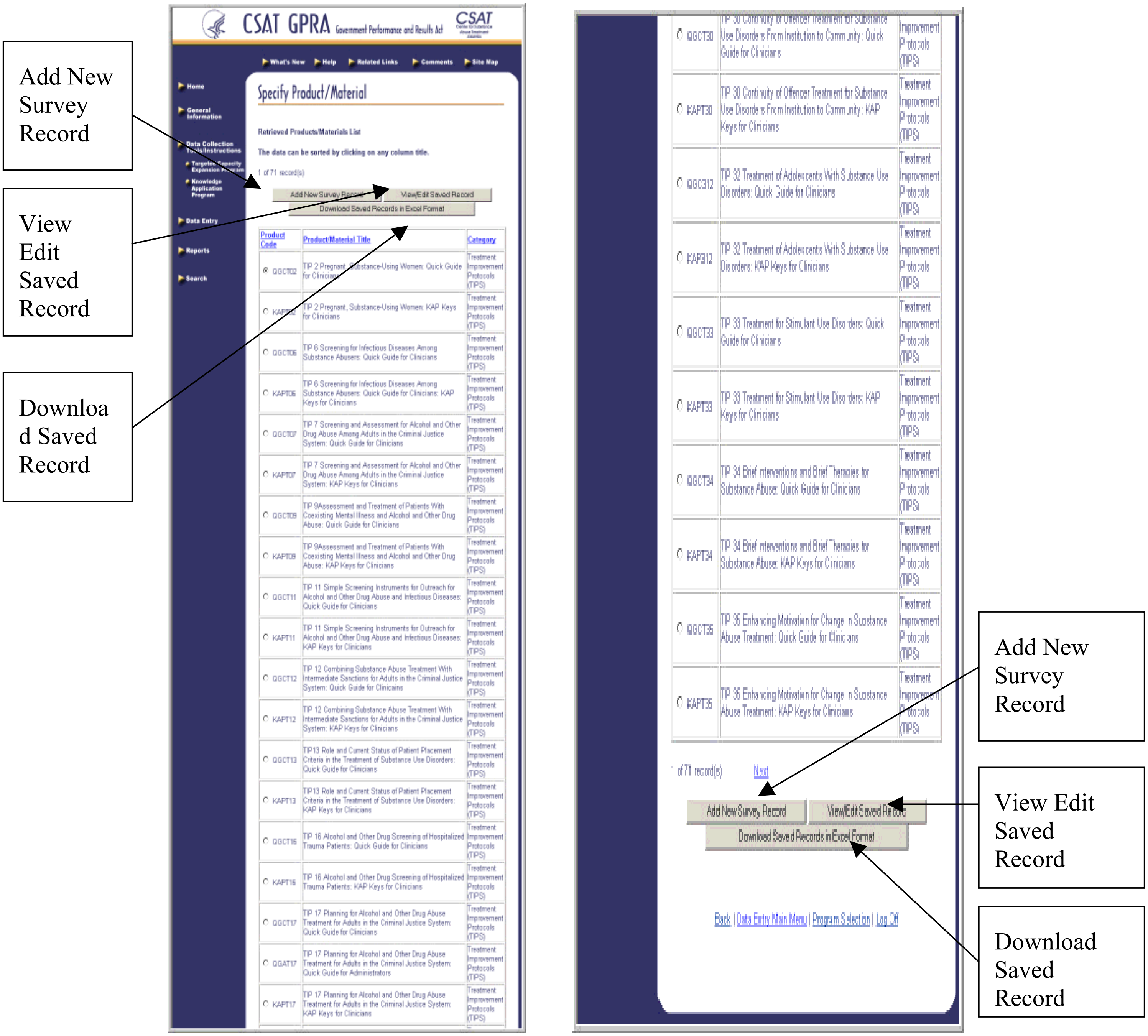
Step 4. Choose a product category.

Note: You can choose an individual category and the products/materials listed in that category display, or you can search all products/materials in the database by choosing "All Categories."

Note: You may also choose to download a saved products/materials record by clicking on the Download Saved Records in Excel Format link**.**

Step 5. Click the "Submit" button. The **SPECIFY PRODUCT/MATERIAL** page displays.

Figure 3-58– Specify Product/Material Page



Step 6. Choose a product code.

Note: You may sort on the product code, product/material title or product Category fields.

Step 7. Choose a product.

Step 8. Click the "View/Edit Saved File" button. The completed **ENTER CONFIRMATION** page displays. You must have a confirmation number to view/edit a saved record.

Note: You may view or edit an existing file by clicking on the "Add a New Product Survey" button.

Note: You may download saved records into Excel format by clicking on the "Download Saved Records in Excel Format" button.

Figure 3-59 – Enter Confirmation Page

Step 9. Enter the record confirmation number.

Step 10. Click "Submit". The completed record product/material survey record displays.

Step 11. Review the saved data, or complete the desired edits.

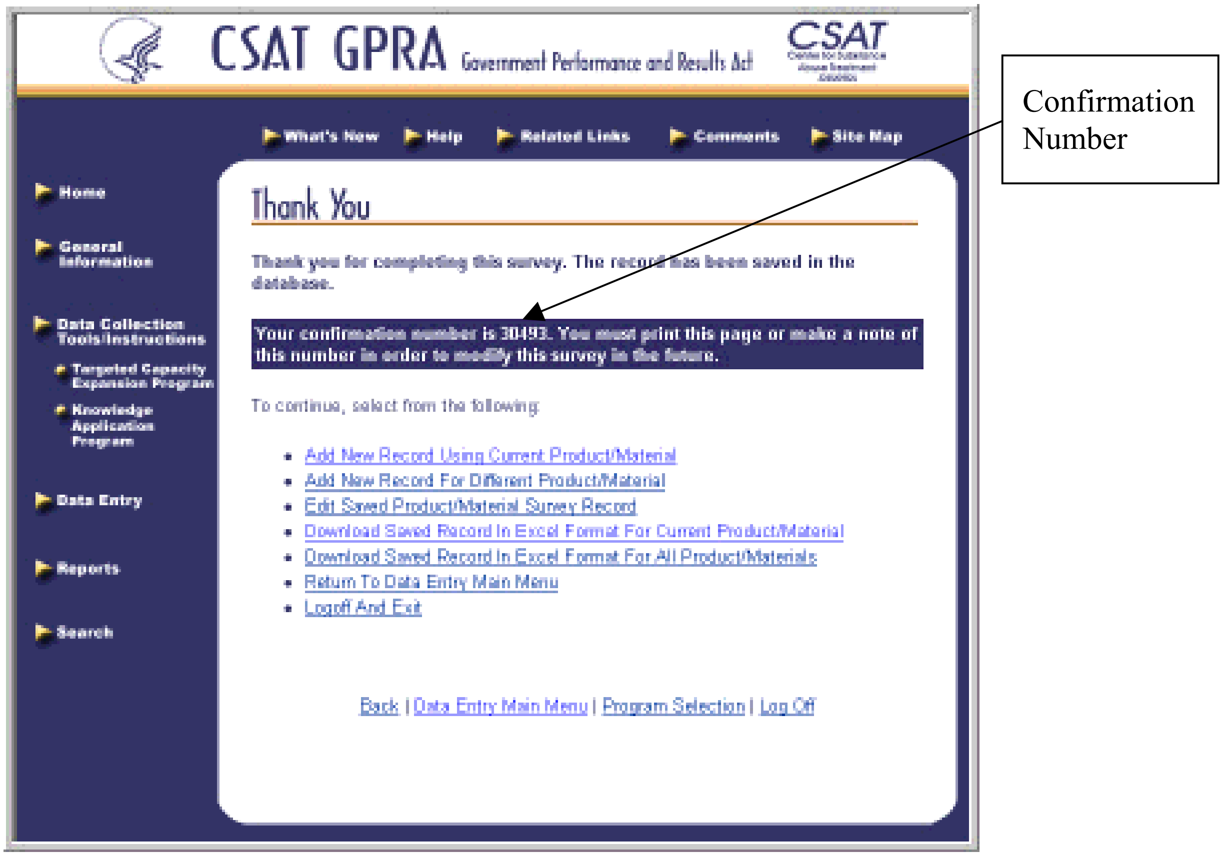
Step 12. Click the "Save" button to save the record. The **THANK YOU** page displays.

Step12a. Click the "Undo" button to delete the information entered in the record.

Step 12b. Click the "Cancel" button to exit the form and return to the main menu.

Note: The edited record will save under the original confirmation number.

Figure 3-60 – Thank You Page



Step 13. Click the Add New Record Using Current Product/Material link to enter a new product/materials survey for the same product or material.

Step 13a. Click the Add New Record For Different Product/Material link to enter a new product/materials survey for a different product or material.

Step 13b. Click the Edit Saved Product/Material Survey Record link to view or edit a saved product/material survey record. Remember you must have the confirmation number in order to view a saved products/materials record.

Step 13c. Click the Download Saved Record In Excel Format For Current Product/Material to download the current saved record in Excel format.

Step 13d. Click the Download Saved Record In Excel Format For All Product/Materials to download all saved records for the current grant number.

Step 13e. To return to the data entry main menu page, click the Return To Data Entry Main Menu link.

Step 13f. To exit the session and logoff the System, click the Logoff And Exit link.