User Guide

FY 2010 StLA Survey

Introduction

The User Guide contains important information for proper use of the web-based StLA Survey system. If any problems occur while using the system, please contact the survey administrators, Dominic Beamer or Cindy Sheckells at govs.stla@census.gov or 1-800-451-6235.

Overview

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

Login

The first time the user logs into the system, they will be required to change their password and register. On subsequent logins, the user will be taken to the **Dashboard** that displays the survey status. If after the first login, the password is forgotten, the user can click the "forgot password" link to gain access to the survey.

Access to the survey system is granted with a valid user ID and password. After a successful login, the user can click on **Start** under the Action column to begin a section. Every page includes a banner with four menus (**Dashboard**, **Reports**, **Help**, and **Logout**).

Navigation

The **Dashboard** and **Go to** option are two main ways to navigate through the survey.

Dashboard— This screen is the first page in the survey. It lists each part of the survey as well as the status of each part in the survey. There are three statuses that each part can be. "Not Started" means that the user has not opened the page. "Errors Exist" means that the user has entered some data, but errors exist. "Clean" means that the data has been entered and no questionable data exists. The status of each part will be updated continually to give the user a constant update on the status of each part. The dashboard is also used to begin each part of the survey. By clicking one of the links under the "Action" column, the user will be taken to a specific part in the survey.

Go to option— This button is used to navigate through the survey. The **Go to** button is shown at the bottom of the each survey part. The drop-down menu can be used to jump to any part in the survey at anytime. The user just has to select the part and click the **Go to** button. *Using the **Go To** option will not save data, if the user needs to save their data they must use one of the other navigation buttons on the bottom of each part.*

Registration

Prior to entering the survey data, registration must be completed by providing information for the items listed. The registration information is populated in the Survey Respondent section of Part A. If the survey respondent information needs to be updated after the registration is complete, it can be done in the Survey Respondent section of Part A.

Survey Data Entry

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

Several screens (e.g., Part A. State Library Agency Identification) are pre-filled with data previously submitted for the agency. *Please verify the information is still correct or update any that has changed*.

Saving/viewing data—Data are saved on a screen-by-screen basis. **Verify & Save** will save the data and keep the user on the current screen. The **Save & Next** button will save the data and advance the user to the next screen. Some survey pages have more than one section, for those pages the **Save & Previous** button will save the data and navigate to the previous section.   *It is recommended that data be saved frequently.*

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

Navigating the survey—Use the **Tab** and **Shift+Tab** keys to move back and forth between the data entry boxes. The **Delete** and **Backspace** keys are active inside each data entry box.

Edit Report
The **Edit Report** option is found on each survey page. The **Edit Report** may be viewed on-screen or printed and is an easy-to-read report with six items, as described below:

- Edit Code (edit message number)
- Line Number (survey item)
- Section (survey part and page)
- Edit Message or Fatal Message
- Values (Current year or Prior Year data that is related to the edit)
- Justification (text box to enter explanations (if applicable))
- Accepted (edit message resolution status—Yes or No)

All edit messages must be resolved, by revising or confirming the data, in order to submit the survey data. To make corrections to the data, click on the section (for example, “L1” in the "Sections" row. To confirm the data, enter an explanation in the “Justification” box and click on **Save**. The “Accepted” column indicates whether the edit message is resolved (“Yes” or “No”). Once all edit messages are resolved, the “Accepted” column of the **Edit Report** will display “Yes” for each message, and the **Submit Data** button will appear on the **Dashboard**. (Subsequent data corrections may generate new edit messages that the user will need to resolve before submitting the survey data.)

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

- **Fatal** (denoted with a red icon). The data must be revised (either missing data must be provided, or correct data must be reported). To revise the data, click on the Section link that will navigate back to the survey page, and enter or edit the data.
- **Explanation** (denoted with a yellow icon). The data are questionable. The user should review the data for accuracy and enter correct data if appropriate. If the questionable data are correct, the user can resolve the edit message by entering an explanation in the justification field provided and click **Save** . *Providing an explanation may eliminate the need for future edit follow-up about the data.* **Accepted** (denoted with a gray icon). The data have been resolved. This icon will appear for an item if the messages that pertain to the questionable data have all been addressed.

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

Submitting the Survey Data
When the survey has been completed and all edit messages have been resolved, the **Edit Report** will display "Yes" in the “Accepted” row for each edit failure. To submit the data, click the **Submit Data** button on the **Dashboard** screen. After clicking “**Submit Data**,” provide an estimate of the number of hours it took to complete the survey. Two options will be given; “**Continue with Locking**” will finish the locking

process of the data, and notify the State Librarian that the data is ready for certification. The second option is, "**Return to Dashboard,**" this button will navigate back to the survey without submitting the data.

The Key Holder must select **"Continue with locking"** to officially complete the survey data submission process. Census is notified at this time that the survey is ready for their review. An e-mail is sent to the user confirming that the survey data have been submitted.

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

After the user selects **Submit Data**, the data will still be viewable and printable. However, additional changes to the data will not be possible unless the Key Holder submits a request to the StLA Help Desk. *This action should not be a substitute for entering the correct data initially.* If data is an error is discovered in the data, contact the StLA Help Desk at govs.stla@census.gov or 1-800-451-6235. They will assist in correcting any errors and resubmitting the data.

Printing
A blank version of the survey data entry form may be viewed and printed using the **Survey Form (Blank)** option found on the **Reports** menu. A File Download dialog box will open, the user will be able to Open or Save the .pdf document. Once opened, the document can then be printed. Use the browser's Back button to return to the previously viewed page.

Users can view and print the form after data have been entered via the **Survey Form (Data)** option found on the **Reports** menu. Users can also view and print forms that contain prior year data via the **Survey Form (Prior Year Data)** option found on the reports menu. The other steps for printing these forms are the same as for blank forms To print the current year data directly from the data entry screens, use the browser **Print** button or the **Print** option (under the **File** menu). A print option is also available from the menu that appears when the right mouse button is pressed.

Users can print the **survey Instructions, Edit Messages and Conditions,** and other information found on the **Help** menu using the browser and mouse print options described above.

State Librarian Certification
After the Key Holder locks the survey data, a message will be sent to the State Librarian's e-mail describing the electronic and paper certification options. The State Librarian can certify online by clicking on a specified link within the e-mail. After clicking the link, the State Librarian will login to the survey using the username and password provided in the package mailed to them. If the State Librarian certifies the data electronically, the Key Holder will be informed immediately via e-mail. Otherwise, the Key Holder should submit the signed certification form to the Census Bureau by regular mail or fax.

Post Edit Follow-up

After data submission, an analyst will review the data and the messages to edit failures. After review, the analyst will post a follow-up document to the survey instrument. This document will contain questions about the data that was submitted. An email will be sent to the user, with notification that there is a document on the Website waiting for review. After logging into the system the dashboard will have a "**Files Available for Download**" section at the bottom. Click the link below the header to download the follow-up edit report. After clicking the link, the user can choose to save or open the file to provide explanations. After providing explanations for each question, save the file then upload it into the Website. To upload the document, click the link under the "**File Uploads**" section of the dashboard. Click the "**browse**" button to find the file that needs to be uploaded. After selecting the file, click open. After the file has been selected click "**Upload File**", the process of uploading the follow-up edit report will be complete.

Follow-up Edit Report
When providing explanations in the follow-up edit report only write a response in the yellow row, labeled "**Response**". Changes to any other cells in the spreadsheet will not be reviewed. If there are problems

providing an explanation in the table, the survey administrators listed on the first page of this user guide should be contacted.

Logout

Users may leave a session at any time using the **Logout** button found on the banner. After 15 minutes of inactivity, the system will log the user out. Be sure to save all data frequently and before logging off by pressing the **Verify & Save** button. In future logins the **Dashboard** provides the status of each part of the survey.