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The System – An Overview

The Web-based Nutrition Education Evaluation and Reporting System (**WebNEERS**), is a data collection, management and reporting system. The system was generated and is maintained through a Cooperative Agreement between the United States Department of Agriculture (USDA), National Institute of Food and Agriculture (NIFA) and Clemson University. WebNEERS collects quantitative data and qualitative data. The quantitative data consists of demographic and program outcome information (reported behaviors pre- and post-education) about program participants and staff. The qualitative data consists of program impacts and success stories. It also incorporates other reporting elements such as the Expanded Food and Nutrition Education Program's (EFNEP) 5-Year Plan/Annual Update, the EFNEP budget sheet and budget justification, and the social ecological framework of the Community Nutrition Education (CNE) logic model. **WebNEERS** has been adopted by many Supplemental Nutrition Assistance Program – Education (SNAP-Ed) programs, run through the Land-Grant University (LGU) systems because of its value and utility.

The Development, Hosting and Maintenance

WebNEERS is a secure web-based system designed, hosted, and maintained by Clemson University. **WebNEERS** was developed to ensure flexibility, decreasing reliance on stand-alone software packages and/or operating systems.

Accessing WebNEERS

WebNEERS can be accessed, by approved users, through any website accessible system, including computers, iPads, Tablets and Smartphones. **WebNEERS** is compatible with the following web browsers*:

- Internet Explorer – version 8 or higher
- Firefox
- Google Chrome
- Safari

Minimum specifications**:

- 1.5MB download speed
- Windows XP

**If the web browser and/or the version number of the browser being used to access the Internet is unknown, contact the computer system administrator within the county, region, or university, to ensure the computer systems meet the minimum requirements.*

***The minimum specifications will allow a user to successfully access/use the system. However, the faster the computer and the connection speed, the better the user's experience will be.*

WebNEERS IP Address

The Expanded Food and Nutrition Education Program (EFNEP) and the Supplemental Nutrition Assistance Program – Education (SNAP-Ed) each have a unique WebNEERS IP Address into which their respective program data are entered. This keeps the data from the respective programs separate.

Each IP Address has been created as a **HyperText Transfer Protocol Secure** (https) site. The https ensures that the information that passes between the web server and the client is secure.

The https address for **EFNEP** is:

<https://www.webneers.net>

The https address for **SNAP-Ed** is:

<https://snap.webneers.net>

System Levels

There are three system levels within **WebNEERS**: Federal, Institute (university), and Region (local).

Federal Level/Users

The Federal level refers to the United States Department of Agriculture, National Institute of Food and Agriculture. The Federal level interface enables national leadership to collect/aggregate data, and to manage and report on the program.

Federal level users have the ability to run reports, to export national data, and to create and manage federal checklists, questions, subgroups (adult and youth), filters, and public assistance programs.



The Federal level is only used for setup purposes to establish SNAP-Ed accounts. NIFA does not collect, manage or report on WebNEERS data for SNAP-Ed.

Institute Level/Users

The Institute level refers to the university level data, which is analogous to the former State Reporting System (SRS). The Institute level interface enables each LGU to define operating parameters, to collect/aggregate data, and to manage and report on the program.

The Institute level users are tasked with creating the environment for Region level users. They can create regions for Region level users to enter data into; manage their various regions, subgroups, filters, checklists, and public assistance programs; create and

manage annual updates/5-year plans, budgets and budget justifications; and create new users. Institute level instructions in this manual have red headers.

Regional Level/Users

The Region level refers to the region level data, which is analogous to the former County Reporting System (CRS5). A region may represent one county or it may represent multiple counties. The Region level interface is the only level at which program participant data can be entered and personal identifiers (name, address, telephone number, etc.) accessed.

The following information can be entered from the Regional level:

- Adult data – including demographics, food recalls, and behavior checklists
- Youth Data – including group demographics and behavior checklists
- Staff Data – including professional, paraprofessional, and volunteer demographic information and hours
- Program Impacts
- Delivery Sites & Partnerships



To provide technical assistance, Institute level users may have access to the Region level interface.

System Components

WebNEERS incorporates region, university, and federal components of the previous Nutrition Education Evaluation and Reporting System (NEERS5) (adult and youth demographic information, pre-post 24-hour recall and behavior checklists on enrolled adults, grade specific evaluations for enrolled youth, etc.). In addition, **WebNEERS** has added the ability to enter, submit and for the Federal level to review the EFNEP 5-Year Plan/Annual Update, the EFNEP budget and budget justification, and the socio-ecological framework of the Community Nutrition Education (CNE) logic model.

Becoming an Approved User

At the heart of **WebNEERS** is a robust permissions system that allows for the creation of users who can serve various roles within the system. Most functions that are available in **WebNEERS** can be managed with user permissions. Through this permissions system, access can be granted or limited for each user at the discretion of the Institute or Region level user. This level of customization is intended to address the needs of the various entities that provide nutrition education programming and the variety of roles and responsibilities of their respective staff. Permission management is addressed in Section 2: Users and Permissions Management.

Specific example of permissions use:

Users can be granted the ability to create new adults, only. When this user logs into the system the only section they are able to access is the adult section, and they are only allowed to enter new records; the deleting and editing functionality is hidden from them.

Important Features

Tabs

Tabs are utilized in **WebNEERS** to create a less crowded workspace. Tabs look and function like the tabs of file folders. The active tab connects directly to the form you can edit while inactive or hidden tabs are grayed out. You cannot edit an inactive or hidden tab until you open it/make it active. The active tab has black font; inactive tabs have blue font.



To quickly move between tabs hold the shift key and press the left or right arrow key on the keyboard. The tabs will open and close according to the directional arrow the user pressed.

Labels

In accordance with 508 compliance, all input fields in **WebNEERS** have labels associated with them. Users with visual handicaps can use screen readers to enter data into forms. Labels allow users to change the current form field by clicking on the label. For instance, if a new staff member is being entered, clicking on the **First Name** label causes the associated first name field to become active; any subsequent typing would be contained within that field.

Dialog Boxes

Dialog boxes are used throughout **WebNEERS** to keep screens from becoming cluttered. For example, in **Adults** and **Youth Group** records, dialog boxes are used to manage the data in the remarks section.



Closing Dialog Boxes

Dialog boxes can be closed in multiple ways. The most common ways are to either select the “X” icon at the top right corner of the dialog box or to press the ESC key on the keyboard.



Closing a dialog box without saving the information will result in the changes made being deleted.

Buttons

Different buttons will appear at the bottom of dialog boxes and data entry screens. These buttons will serve to either **Save** the changes, **Create** the item, or **Cancel** the process (exit the dialog or the data entry screen) without saving the information.

Form Validation

The form validation system implemented in **WebNEERS** employs real time validation and notifications, allowing the user to receive error messages real-time. Below are the main components of the validation system.

Required Fields

All required fields are outlined in red. The outline will remain, whether or not the user has successfully entered data into the field.

Error Notifications

These notifications are displayed when a required field is skipped or the data contained in the field does not meet the required format.



These notifications will “pop up” in the upper right of the input field for text based entry or drop downs, and will display directly above checkboxes and radio buttons. They will also appear above the tab containing the data field in need of correction.



Error notifications are always red and serve only to alert the user that they cannot continue until the error is properly addressed.

Invalid Submission Behavior

If a user attempts to submit a form without completing the required fields or addressing the error notifications, he/she will automatically be redirected to the first field that is incorrect and an error notification will be displayed indicating the necessary steps to complete the form. If this field is located on a tab that is not currently active, the user will be first directed to the tab and then shown the appropriate error message.



Note:

In cases of invalid submissions, all other data which is correct will not be lost. The user will be given the opportunity to fix the issues and continue without needing to re-enter any data.

Active Fields:

















Form fields that users are currently editing are highlighted in yellow.






The screenshot shows a web form titled "New Youth Group" with a red "Attention Needed" notification at the top. Below the title are four tabs: "CONTACT INFORMATION", "LEADERS", "ENTRY & EXIT DATA", and "DEMO". The "LEADERS" tab is active. Below the tabs, there are three sections: "Name", "Mailing Name", and "Address". The "Name" field is outlined in red with a red error message "* This field is required". The "Mailing Name" field is highlighted in yellow. The "Address" field is empty.

Icons

Icons are used in place of text to simplify the WebNEERS screens. These icons facilitate the user in completing an intended task.

Describing the Icons

	Select	This icon indicates an item is selected and will be included
	De-select	The absence of a check indicates the item is not selected and will not be included
	Manage	The manage icon is used on the Home page to indicate the link is for a page where data may be created/added, edited or deleted
	Report	The report icon is used on the Home page to indicate the link is for a page where a report can be created
	Setup	The setup icon is used on the Home page to indicate the link is for a page where system management functions takes place. It is also used in the adult and youth group checklist sections to add additional question sets, when such sets are available  Note: <i>Additional question sets can only be added in the checklist sections if they are created by an <u>Institute level</u> user and made available to that Region</i>
	Tables	The tables icon is used on the Home page to indicate the link is for a page where system tables are located
	Create/Add	The create/add icon is used to bring up another screen that allows the user to create or add a new record
	Edit	The edit (wrench) icon is used to bring up another screen that allows the user to edit the information in a record
	Delete	The delete icon is used to delete a record from the database  Note: <i>Before selecting the delete icon, please make sure the item selected/the information highlighted should be deleted. Once an item has been removed there is no way to restore it; you cannot “undo” a deletion.</i>
	Calendar	The calendar icon enables the use of a calendar pop up to select a date for the date field located to the immediate left of the button
	View Food Details	The view food details icon is used to show the details of food items (food group data, nutrients, and weights and measures) within a recall and in the foods database table
	Preview	The preview icon is used to preview the data in a report
	Print	The print icon is used to either open the browser’s print dialog box or to create a PDF.  Note: <i>In some cases the print icon will specify “PDF” or “Print” to the right of the icon</i>

	Sort	The sort icon is used to sort the data in a table in ascending and descending order  Note: <i>Select the sort icon once to sort the column in ascending order (a,b,c... 0,1,2...), select a second time to sort in descending order (z,y,x... 9,8,7...). The sorted column will show one arrow. If it is sorted ascending, an up arrow; descending, a down arrow.</i>
	Home	The home text, which appears in the light-gray bar at the top of the screen, is used to return the user to the home page
	Back	The back text, which appears in the light-gray bar at the top of the screen, is used to return the user to the previous page
	Download	The download icon is used to download a comma separated value file (CSV) of the data



Tip:

If users hover their mouse arrow over an unlabeled icon, a description of the icon's function or purpose will pop up.

Screen Layout

All major functions of **WebNEERS** are represented on the home screen. A user with full permission can click on all items on the home screen; a user with limited permissions may only be able to click on some items on the home screen (any which are not grayed out). Permissions are discussed in greater detail in Section 2.

Regional Level Home Screen

The majority of the Region level web site real estate is broken down into three columns:

- Adults
- Youth Groups
- Staff

Each of these topic areas are broken down into categories of tasks which allow the user to manage data, generate reports, or setup local information to enhance the functions of **WebNEERS** and meet the local level needs (see below for additional details). At the bottom of each column are additional links that include **Region Users** and **Data Management** (Adults column), **Tables** (Youth Groups column), and **Annual Updates, Checklists** (Staff column).



Note:

See the screenshot of the Region level **Home page** at the end of this section.

Institute Level Home Screen

The majority of the Institute level web site real estate is broken down into three columns:

- **Annual Update/5-Year Plan, Summary Reports** (adult, youth, staff), **Browse** (adult, youth, and staff)
- **Checklists** (manage and reports), **Setup** (subgroups, filters, public assistance)
- **Users** (manage), **Regions, Reporting Years, Tables, and Export Data**



See the screenshot of the Institute level **Home page** at the end of this section.

Home, Breadcrumbs, Account Management, and Logout buttons

The very top of WebNEERS is a series of gray bars that contain important navigation controls within the system.

Top Dark Gray WebNEERS Navigation Bar

- **WebNEERS** logo – clicking here will always return the user to the **Home page**.
- **Help** – clicking here will take you to options for help - links to: user manuals, the system administrator, and the help desk where you can ask/answer questions.
- **WebNEERS Manuals** – clicking here will take you to the online user manuals.
- **User Name and User Type** – clicking here will open the user information screen. You can update your name and password. You can also view the regions you have access to (Region level users only) as well as confirm your assigned permissions. The user type appears in parentheses after your user name.
- **Countdown Clock** – the countdown clock shows how much time remains until you are logged out of the system based on inactivity. Every time you click a button or move to a different screen the timer resets.
- **Logout** – clicking here will log you out of the system when you are finished.

Middle Medium Gray WebNEERS Navigation Bar

- **Home** – This medium gray bar is where the breadcrumb trail will appear throughout the system. The breadcrumbs allow the user to see where they are in the system and maneuver back to previous screens or to return directly to the **Home page** without selecting the browser “back” button.



The breadcrumb trail should only be used to navigate backwards once data has been saved. If you use the breadcrumb without saving, the data you entered will be lost.

Bottom Light Gray WebNEERS Navigation Bar

- **Institute** – This is the institute that you are associated with in WebNEERS.

Region Dropdowns

- **Region Dropdown** – If you are part of more than one region, use this dropdown menu to choose the region that you want to view data or enter data into.
- **Reporting Year Dropdown** – Choose the reporting year you wish to view. Region data from previous reporting periods is VIEW ONLY. Data can only be entered in the current reporting period.

Institute Dropdowns

- **Reporting Year Dropdown** – Choose the reporting year you wish to view. Data from previous reporting periods is VIEW ONLY. Data can only be entered in the current reporting period.



Data for previous reporting years is locked during the submission process. SNAP-Ed data is not submitted to NIFA so if users switch to a previous reporting year it is important to be cautious because their data is editable.



Home Page Functions

Entering and Editing Data – MANGAGE

Users can manage data by adding new adults, youth groups or staff, updating information currently in the system, or, when necessary, deleting information.

Managing individual records is only available at the Regional level.

Manage ADULTS:

Adding new adults and/or editing adults already in the system are completed by selecting the **Manage Adults** link. WebNEERS includes pre- and post-education recalls and checklists for individual adults. These can be completed as the record is added or edited.

Managing recalls or checklists already in the system or adding an exit recall or checklist without going into the **Manage Adults** link, can be completed by choosing **Manage Recalls** or **Manage Checklists**.



For step-by-step instructions on the process of adding or editing an adult participant, see Section 5: Managing Adults, Adding, Editing, and Reporting of this manual.

Manage YOUTH GROUPS:

Adding new youth groups and/or editing youth groups already in the system are completed by selecting the **Manage Youth Groups** link. WebNEERS includes pre- and post-education checklists for individual youth. These can be completed as the record is added or edited.

Managing checklists already in the system or adding exit checklists without going into the **Manage Youth Groups** link, can be completed by choosing **Manage Checklists**.



For step-by-step instructions on the process of adding or editing a youth participant, see Section 6: Managing Youth, Adding, Editing, and Reporting of this manual.

Manage STAFF:

Adding new staff and/or editing staff already in the system is completed by selecting the Manage Staff link.



Note:

For step-by-step instructions on the process of adding or editing staff, see Section 4: Managing Staff, Adding, Editing, and Reporting of this manual.



Note:

No adults or youth groups can be entered until staff are added to WebNEERS.

Reviewing and Aggregating Data - REPORTS



A variety of reports and management tools are available from WebNEERS. These tools include:

Mailing Labels

The ability to generate mailing labels for adult participants, youth groups, and staff/volunteers.

Email Lists

The ability to generate comma-separated value files which contain the email addresses of adult participants, youth group leaders, and staff/volunteers. These files can be used to generate electronic communications with current and/or past contacts.

Summary Reports

The ability to generate detailed summary reports aggregating the data entered in the system. Understanding the reports available within WebNEERS will help you use them to best meet your local programming and reporting needs. All of the reports are useful in program management.



Note:

For more detailed documentation about what is contained in each of the summary reports please see the appropriate section:

- *Section 5 – Adults*
- *Section 6 – Youth*
- *Section 4 – Staff*

Lists

The ability to generate reports based on data entered into the system. The content of the information contained within the reports vary by category (adults, youth groups, staff), as well as the criteria used to generate the requested reports (date ranges, subgroups, filters, etc.).



For more detailed documentation about what is contained in each of the lists please see the appropriate section:

- *Section 5 – Adults*
- *Section 6 – Youth*
- *Section 4 – Staff*

Reviewing and Aggregating Data - REPORTS

A variety of reports and management tools are available from WebNEERS. These tools include:

Summary Reports

The ability to generate detailed summary reports aggregating the data entered in the system. Understanding the reports available within WebNEERS will help you use them to best meet your local programming and reporting needs. All of the reports are useful in program management.



For more detailed documentation about what is contained in each of the summary reports please see the appropriate section:

- *Section 5 – Adults*
- *Section 6 – Youth*
- *Section 4 – Staff*

Lists

The ability to generate reports based on data entered into the system. The content of the information contained within the reports vary by category (adults, youth groups, staff), as well as the criteria used to generate the requested reports (date ranges, subgroups, filters, etc.).



For more detailed documentation about what is contained in each of the lists or reports please see the appropriate section:

- *Section 5 – Adults*
- *Section 6 – Youth*
- *Section 4 – Staff*

Browse Screens

The ability to generate a table with aggregated values for key data points by region and using filters. The content of the information contained within each table varies by category (adults, youth groups, staff).



Note:

For more detailed documentation about what is contained in each of the browse screens please see the appropriate section:

- *Section 5 – Adults*
- *Section 6 – Youth*
- *Section 4 – Staff*

Personalizing WebNEERS - SETUP

The setup features for each section (adult, youth groups, staff) allow users to identify and personalize **WebNEERS** to meet their data entry and tracking needs.

Subgroups, Filters, Public Assistance Sets

Where needed, Region level users are able to create subgroups or filters for adults or youth groups and to create public assistance programs for adults



Note:

When a subgroup is created, an option to create a related filter is also available. It is suggested to select this option if you would like to filter data by the subgroup.



Note:

For more information on setting up the system to better meet local needs, see Section 3: Setup: Customizing the System to Meet Local Needs.

Defaults for Adults and Youth Groups

To simplify data entry, Region level users are able to establish defaults for new entries. This might include the completion of certain fields within an adult or youth group record.



Note:

For more information on setting up the system to better meet local needs, see Section 3: Setup: Customizing the System to Meet Local Needs.

Transfer Responsibilities

The **Transfer Responsibilities** option is available to move/reassign participants from one staff member to another without accessing each individual record.

Note:

For more information on Transferring Responsibilities, Section 4: Manage Staff, Adding, Editing and Report.

Personalizing WebNEERS - SETUP

Subgroups, Filters, Public Assistance Sets

Where needed, Institute level users are able to create subgroups or filters for adults or youth groups and to create public assistance programs for adults

Note:

When a subgroup is created, an option to create a related filter is also available. It is suggested to select this option if you would like to filter data by the subgroup.

Note:

For more information on setting up the system to better meet local needs, see Section 3: Setup: Customizing the System to Meet Local Needs.

Region

The Institute level user is able to manage the Region level databases (add and edit). This includes creating new regions; assigning/removing users, subgroups, filters, public assistance, question sets, etc. to/from regions or reviewing which of the aforementioned are included in a particular region; or, when necessary, deleting regions.

Additional Home Page Features

The Institute level user is able to view the ID number of the region, the counties of which the region reflects, the migration status (if data has been migrated from one reporting year to the next), and has the ability to export the data for use outside of the **WebNEERS**.

Note:

The migration and export options are not visible to a Region level user unless the Institute level user gives the region permission to do so.

User

The user feature enables the logged in user to manage (add, edit or make inactive) other users he/she created. Region level users can only manage other region level users in the region(s) they are assigned; Institute level users can manage other Institute level users and Region level users. The ability to add or edit users and/or edit user permissions may or may not be provided to all **WebNEERS** users.



Note:

For more information on the user feature, see Section 2: Users and Permissions Management for more information.

Tables

The tables section should not be confused with the description of the **Tables** provided in **Helpful Hints for working in WebNEERS** below. The tables feature provides access to the information used to analyze diet recall data and poverty information on participants. These tables provide the background data and are provided for information purposes only. They are not editable at either the Institute level or Region level. All edits are done by the WebNEERS System Administrator. The date of last update is provided for each table under the title.

Table Version Info

This provides you with direct links to where table information was collected.

View Foods

The View Foods tables, formerly called the “food dictionary”, displays a listing of food items available for inclusion in the diet recalls. The View Foods table displays the description, additional description and the Food Code. Foods items can be searched by description or food code. The data can be printed or downloaded and saved to an external device.

Daily Recommendations

The Daily Recommendations tables display information used to calculate daily food group recommendations based on age. From the Daily Recommendations screen, note the date Last Updated. Select the Year dropdown to view information for another year.



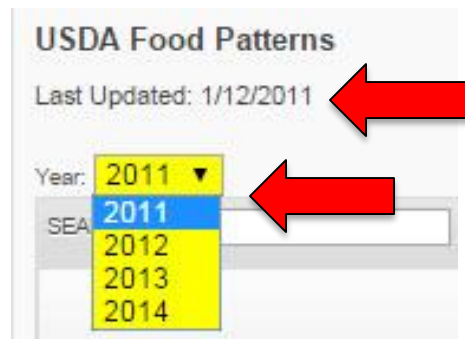
Recommended Calories

The Recommended Calories table provides estimated amounts of calories needed to maintain energy balance for various gender and age groups at three different levels of physical activity. From the Recommended Calories screen, note the date Last Updated. Select the Year dropdown to view information for another year.



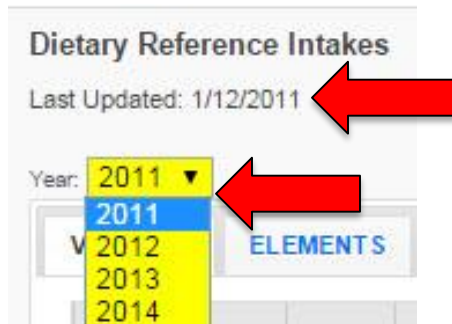
USDA Food Patterns

The USDA Food Patterns table suggest amounts of food to consume from the basic food groups, subgroups, and oils based on caloric intake. From the USDA Food Patterns screen, note the date Last Updated. Select the Year dropdown to view information for another year.



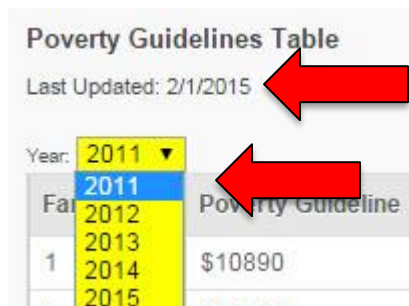
Dietary Reference Intakes

The Dietary Reference Intakes (DRI) tables provides the recommended daily intake levels for nutrients by age, gender, and pregnancy status. These recommendations are considered sufficient to meet the requirements of 97–98% of healthy individuals. From the Dietary Reference Intakes screen, note the date Last Updated. Select the Year dropdown to view information for another year.



Poverty Guidelines Table

The Poverty Guidelines table is used to calculate percentage of poverty data for EFNEP families. From the Poverty Guidelines Table screen, note the date Last Updated. Select the Year dropdown to view information for another year.



Annual Update/5-Year Plan

The annual update/5-year plan feature enables the user to manage (add and edit) information related to other elements of programming. The type of information available varies by level.

Region Level

The Region level user is able to add or edit program delivery sites/community partnerships and program impact information. The program delivery sites/community partnerships section asks the user to provide the number of different sites reached in a given program year and document the number of partnerships that have been formed. The program impact section captures qualitative success stories on program delivery.

Institute Level

The Institute level user is able to manage (add and edit) the university's 5-Year Plan/Annual Update, budget and budget justification. These data were collected through the Request for Application (RFA) in years past. This section also allows Institute level users to manage program impact and delivery sites/community partnership data submitted by Region level users and entered by Institute level users.

Checklists

The checklist feature enables Institute level users to add question sets, based on questions existing in the **WebNEERS** database of questions, or add new questions for inclusion in question sets to be used at the Region level. Both Institution and Region level users have the ability to view the available checklist sets and to run checklist related reports



For more information on creating question and/or question sets for use at the Region level, see Sections 5 and 6 to learn more about Questions and Checklists.

Helpful Hints for working in WebNEERS

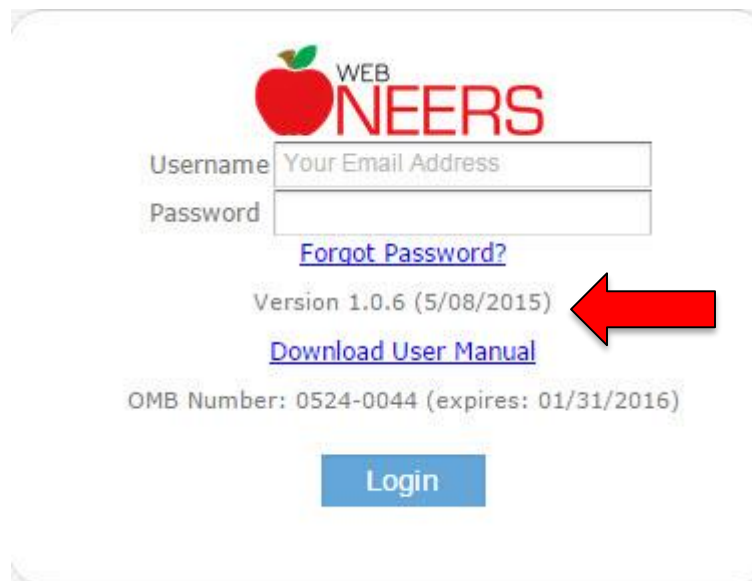
The section below contains guidance and helpful hints to assist to better understand the system, the data entry and review process.

Data Backup

WebNEERS Data is backed up automatically at least three times each day.

WebNEERS Version Number

The version number and release date are displayed on the log in page for WebNEERS below the "forgot password?" link. This lets a user know the last time an update was pushed and changes were made to the software.



The version number and release date are also displayed at the bottom of each WebNEERS page after users log into the system. To access the "version" page and see the list of changes: log into the system, scroll to the bottom of the page, and click on the current version number. This will open a new page with information on the update.



Tables

Tables in **WebNEERS** are dynamic. Some of the main features include:

Search

A live search feature helps users find specific records:

1. Click into the search input box in the head of a table

SEARCH:

2. Enter the keywords of the search – as the user types, the table will begin to populate with results that best match what is being typed

The search includes every column of the table automatically, allowing the search to indiscriminately search the contents of the table without requiring a predetermined selection of a given column. A message “*No matching records found*” indicates a match for the text typed cannot be found; verify the search parameters and try again.



Note:

If the table is set to only show 10 rows out of a possible 100, the search will still include all 100 rows.






Note:

*The only place within **WebNEERS** that the live search feature does not work is in the add foods section of the adult recalls. This table is too large to use a live search so users must click “enter” on their keyboard after entering the search term(s) to process the request.*

Sorting

Most tables in **WebNEERS** can be custom sorted real time, allowing users to quickly sort information in any desired order.

1. Click the title of the column to be sorted. By default, **WebNEERS** generally attempts to sort data by ID, if one exists.
2. The first time the title is clicked, the arrow icon will change from both up and down () to up () to indicate the table is sorted on that column in ascending order.
3. If you click the title again, it will toggle the sorting from ascending to descending order and display a down arrow ().

Moving between pages

If the number of rows in a table exceeds the number of entries set to show on a page, the table will automatically paginate the resulting data. In order to navigate between these pages, click the left or right arrows located at the bottom right corner of the table.

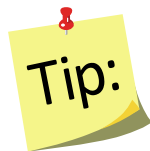
Selecting the number of entries per page

The number of rows displayed in the table will depend upon the number selected in the dropdown box on the top right corner of the table. Changing the value in the dropdown box will automatically re-paginate the table.

Performing Data Entry

Use of Tab Key

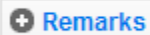
To speed up data entry, the user may choose to move between form fields by pressing the tab or enter key on his/her keyboard. If the user is on the last input field of a screen that uses the tab or enter key, he/she will automatically be forwarded to the next data entry tab, provided the user is not currently on the last tab of the page.



To select/deselect check boxes or to select items in a dropdown box, click the space bar on your keyboard.

Remarks

Adults and **Youth Groups** have remarks boxes that are hidden from normal view. If the record includes remarks, it will have **Comments Available** in red text to the left of the remarks button.

Comments Available 

Cancel and Save Buttons

The **Cancel** and **Save** buttons for each data entry screen are located at the bottom of the page and aligned to the left. These buttons will **Cancel** or **Save** any edits made anywhere on the form, not just the visible tab. For instance, if a new adult is being entered and the user fills out the **Contact Info** tab and moves to the **Entry Data** tab and then selects **Save**, the information contained on the **Contact Info** tab will be saved in addition to the information on the **Entry Data** tab, even though it is not currently visible.

*The system is set up to best work by clicking the **Save** button only when the user is completely finished adding or modifying a record.*



*On pages with tabs to divide content there is only one set of **Cancel** and **Save** buttons. These buttons will **Cancel** or **Save** the entire form, not just the visible tab.*



For adults and youth groups, addresses cannot be verified and checklists and recalls cannot be added until the record is saved for the first time. The first save establishes the adult or the youth group in the system. Up until the first save, the cancel button can be used to prevent an errant record from being added. After the adult or youth group is established, clicking save will save and close the record and clicking cancel will cancel any data entered after the last time the user clicked save.

Calendar

Dates on data entry and reporting screen are masked to only allow for proper entry. Dates must always be entered in MM/DD/YYYY format. Users can choose to manually type the date themselves or select the blue calendar icon (📅) beside the field to select one from a calendar drop down.

Phone Numbers

Phone numbers are masked in a similar fashion to dates. They must be entered as (999) 999-9999.

Screenshots

The Home Page: Regional Level

The screenshot displays a dashboard with several sections:

- Adults:** Manage Adults, Manage Recalls, Manage Checklists, Verify Addresses, View Adult Errors, Reports (Adult Mailing Labels, Email List (CSV), List of Families by Staff Member, Recall List Report, Adult Checklist Review, Adult Summary, Adult Diet Summary, Adult Checklist Summary, Subgroup List, Filter List, Public Assistance List), Setup (Defaults for New Adults, Subgroups, Filters, Public Assistance).
- Youth Groups:** Manage Youth Groups, Manage Checklists, Verify Addresses, View Youth Errors, Reports (Youth Mailing Labels, Email List (CSV), Group Detail Report, Group Names by Leader, Group List, Group Leader Summary, Group Review by ID, Youth Checklist Review, Youth Summary, Youth Checklist Summary, Subgroup List, Filter List), Setup (Defaults for Youth Group, Subgroups, Filters).
- Staff:** Manage Staff, Manage Hours, View Staff Errors, Reports (Staff Mailing Labels, Email List (CSV), Status, Staff List, Volunteer List, Profile Summary), Setup (Add Staff (Data is Read-only), Transfer Responsibilities (Data is Read-only)).
- Annual Update/5-Year Plan:** Manage Program Impacts, Edit Delivery Sites and Partnerships.
- Checklists:** Adult (View Adult Checklist Sets), Youth (View Youth Checklist Sets), Reports (Adult Checklist Set Report, Youth Checklist Set Report, Adult Question List Report, Youth Question List Report, Adult Question Detail Report, Youth Question Detail Report).
- Data Management:** Migrate Data, Export Data.
- Users:** View Users, Add User, View Pending Users.
- Tables:** Table Version Info, View Foods, Daily Recommendations, Recommended Calories, USDA Food Patterns, Dietary Reference Intakes, Poverty Guidelines Table.



Note:

If a Region level user has restricted permissions, some of the buttons above may be grayed out (not selectable).



SNAP-Ed:

SNAP-Ed users do not have access to the verify address option under Adults and Youth Groups. These options are grayed out (not selectable).

The Home Page: InSTITUTE level

Annual Update/5-Year Plan

- [Manage Annual Update / 5-Year Plan](#)
- [Manage Program Impacts](#)
- [Manage Budget Files / Justifications](#)
- [Manage Delivery Sites and Partnerships](#)

Checklists

Adult

- [Manage Adult Checklist Sets](#)
- [Manage Adult Questions](#)

Youth

- [Manage Youth Checklist Sets](#)
- [Manage Youth Questions](#)

Users

- [View Users](#)
- [Add User](#)
- [View Pending Users](#)

Summary Reports

Adult

- [Adult Summary](#)
- [Adult Diet Summary](#)
- [Adult Checklist Summary](#)

Youth

- [Youth Summary](#)
- [Youth Checklist Summary](#)

Staff

- [Staff Summary](#)

Reports

- [Adult Checklist Set Report](#)
- [Youth Checklist Set Report](#)
- [Adult Question List Report](#)
- [Youth Question List Report](#)
- [Adult Question Detail Report](#)
- [Youth Question Detail Report](#)

Institute Regions

- [Manage Regions](#)
- [Add Region](#)

Reporting Years

- [Manage Reporting Years](#)
- [Manage Reporting Dates](#)
- [View Feedback Report](#)

Browse

Adult

- [Browse Adult Summary](#)
- [Browse Adult Diet Summary](#)
- [Browse Adult Checklist Summary](#)

Youth

- [Browse Youth Summary](#)
- [Browse Youth Checklist Summary](#)

Staff

- [Browse Staff Summary](#)

Setup

Adult

- [Adult Subgroups](#)
- [Adult Filters](#)
- [Adult Public Assistance](#)

Youth

- [Youth Subgroups](#)
- [Youth Filters](#)

Tables

- [Table Version Info](#)
- [View Foods](#)
- [Daily Recommendations](#)
- [Recommended Calories](#)
- [USDA Food Patterns](#)
- [Dietary Reference Intakes](#)
- [Poverty Guidelines Table](#)

Reports

Adult

- [Adult Subgroup List](#)
- [Youth Subgroup List](#)
- [Adult Filter List](#)
- [Youth Filter List](#)
- [Adult Public Assistance List](#)

Data Management

- [Export Data](#)
- [Migrate Data](#)



Note:

If an Institute level user has restricted permissions, some of the buttons above may be grayed out (not selectable).