Chapter 2

2 DATA ENTRY

Accessing Data Entry Application

A data entry application allows you to:
- add new reports to the database
- query and update existing reports
- print reports
- transmit reports

To access a data entry application, choose the UIR option from the state Application Menu, and then the Data Entry menu option. The Data Entry menu expands, displaying the UIR reports categories, as shown in Figure 2.1:

![UIR Menu](image)

Each of these categories contains one or more individual reports. Choose one of these categories to display individual report option(s). Click on the Report to open its data entry screen.

Note: Only authorized users can run these applications. If the user is not logged in already, then an authorization screen will appear. Refer back to Chapter 1, Getting Started, on how to log into and run the application. After logging in successfully, the user will be logged on the report data entry query/add screen.
Data Entry

Query/Add Screen

A Query/Add screen is displayed, as shown in Figure 2.2.

![Image of Query/Add Screen]

**Figure 2.2 Report Query/Add Screen**

Users have the option of entering data for a new report or to query a previously entered report. A Data Entry application query/add screen is comprised of the following:

- **Query Fields**
  
  A report can be selected or added by using the following query parameters:

  - **Radio Buttons**: You can use the radio buttons to either query report(s) or add a new report. When you query the reports, the application retrieves the records according to the report date you supply and orders them chronologically by the report date, displaying the earliest one first.

  - **Query Option**: Click on the dropdown menu to choose one of the following options and then enter a report date (example, 06/30/1996) in the text box next to it:
    - **EQUAL TO** Searches for reports with a Report Date equal to the date
you enter (example, 06/30/1997).

- **GREATER THAN** Searches for all reports in the database with Report Date(s) occurs after the date you enter (example, 06/30/1997).

- **LESS THAN** Searches for all reports in the database with Report Date(s) prior to the date you enter (example, 06/30/1997).

  - **“Add” Option:** Select the “Add” option to enter data for a new report. Enter a Report date to specify the report period.

  - **Report Date:** The next due date for the report is automatically filled in for the Add option. The user can change the date to enter the report data for some other reporting period. The Report Date format is MM/DD/YYYY (for example, 06/30/2007).

  **Note:** The report date is the last day of the period to which a report pertains. Each report has its own reporting period or cycle: weekly, monthly, quarterly, or annually.

- **Action Buttons**
  The query/add screen has the following action buttons:
  - **Submit Query:** Submits the user's request.
  - **Clear Query:** Resets all the fields to the default.

- **Navigation Bar**
  The Navigation Bar displayed at the bottom of the application screen helps the user to access one of the following:
  - **Home:** Display the Applications Menu Page.
  - **Feedback:** Display the feedback contact information.
  - **Help:** Display the current application help.
**Data Entry**

**Data Entry Screen**

After entering query parameters, click the *Submit Query* button. A data entry screen appears, as shown in Figure 2.3. Many reports require you to scroll down in order to complete the entire report.

![Data Entry Screen](image)

**Figure 2.3 Data Entry Screen**

A data entry screen is comprised of the following:

- **Record Navigation**

  When you query the reports, the application retrieves the records according to the report date(s) you supply and orders them chronologically by the report date, displaying the earliest one first. The following options help you browse the records.
  
  - *First*: Displays the first (earliest) record in the sequence.
o **Prev**: Displays the previous record in the sequence.

o **Next**: Displays the next record in the sequence.

o **Last**: Displays the last (most recent) record in the sequence.

- **Action Buttons**

  The following action buttons are displayed at both the top and bottom of the application screen:

  o **Query**: Query one or more reports that have been saved to the Database. The query/add screen will be displayed when you click on the query button.

  o **Add**: Add a new report to the Database. The query/add screen will be displayed when you click on the add button.

  o **Update**: Make change(s) to the report. The data fields can be edited when you click on the update button.

  o **Save**: Save the change(s) to the Database. The changes will be validated first, and the review edit screen will be displayed if any errors or warnings are found. The changes will not be saved to the Database if one or more fatal errors are found. However, if only non-fatal error(s) or warning(s) are found, you will be provided with a "Continue to Save" option. When the data has been saved into the database, the message, "Record has been saved successfully" will be displayed.

  o **Cancel**: Cancel the change(s) that you have made. The data will revert to the value you saved into the Database the last time you modified the record. A prompt, “Any data that is not saved will be lost. Do you want to continue?” is displayed. The user can click on the ‘OK’ button to exit out of data entry or click on the ‘Cancel’ button to continue with data entry.

  o **Validate**: Check for any errors in the report. The review edit screen will be displayed with the appropriate message(s).

  o **Transmit**: Send the report to the NO. The review edit screen will be displayed if any errors/warnings are found. The report will not be sent to the NO if one or more errors are found. However, if only warning(s) are found, you will be provided with a list of the warnings and the "Continue to Transmit" option. The message, “Record has been spooled successfully for transmission” is displayed when the report is ready for pick-up by the NO.

  o **Output**: Display the report in a printable format.

  o **Exit**: Quit a Data Entry application. If the user is in ADD or UPDATE mode, a prompt, “Any data that is not saved will be lost. Do you want to continue?” is displayed. The user can click on the ‘OK’ button to exit data entry or click on the ‘Cancel’ button to continue with data entry. If you select “OK”, a prompt, “Are you
sure you want to exit?” is displayed. The user can click on the ‘OK’ button to exit out of the application or click on the ‘Cancel’ button to continue with data entry.

The state of the action buttons varies according to the data entry process. For example, Query, Add, Update, Transmit and Output buttons are disabled when you are updating the report.

- **Header Section.** Contains information identifying the report, such as:
  - **Title:** Displays the full report title (example, ETA5159 Claims and Payment Activities).
  - **Report for Period Ending:** This date is always the last day of the report period.
  - **State:** Displays your state.
  - **Region:** Displays your Region.
  - **Creation Date:** The date the report was created.
  - **Revision Date:** The date the report was last updated.
  - **Transmit Date:** The date the report was first sent to the NO.

- **Data Fields**
  The number and the names of the report's data fields vary by report. Please click on the "Field Help" link for help information on each data field or refer to ET Handbook 401 for detailed information. Data is entered or modified in each of the data field.

- **Field Help**
  Field Help is a link in the upper right corner of the application screen. It displays the help information for the data field which is in focus.

- **Comments Field**
  Describe unusual fluctuations in this report, as compared to prior reports, that relate to administrative, legal, or economic factors. Maximum size of the comments field is approximately 150 words.

- **Last Value Saved**
  Last Value Saved is a checkbox that is displayed in the upper right corner of the application screen only when you are updating the report. When the checkbox is checked, you can browse through the report data fields to review the last saved values in the
Database.

- **Navigation Bar**

  The Navigation Bar is displayed at the bottom of the application screen, which helps the user to access one of the following:

  o *Home*: Display the Applications Menu Page.
  
  o *Feedback*: Display the feedback contact information.
  
  o *Help*: Display the current application help.

- **Function Keys**

  You can navigate through these various sections of the Data Entry screen in several ways:

  o *Tab*: Move cursor to the next field.
  
  o *Arrow up/right*: Move cursor to next field.
  
  o *Arrow down/left*: Move cursor to previous field.
  
  o *[Alt]-S*: Save the change(s).
  
  o *[Alt]-C*: Cancel the change(s).
  
  o *[Alt]-V*: Validate the report.
  
  o *[Alt]-T*: Transmit the report to the National Office (NO).
  
  o *[Alt]-O*: View, print, or save the report.
  
  o *[Alt]-X*: Exit the application.
Data Entry

Adding the Report Data

When a data entry screen appears, all numeric fields are defaulted to 0. The Action Buttons, *Query, Add, Update, Transmit,* and *Output* are grayed out

- Replace the zeros with the correct values
- Validate the Report
- If errors are found, then correct the data
- If warnings are found, then review and correct data if necessary
- Save the Report
- Transmit the Report, if there are no errors.
- Exit the Application

Updating the Report Data

When a data entry screen appears, it will be filled with data that is currently stored in the database. The Action Buttons, *Save* and *Cancel* are grayed out

- You can either choose to *Update, Validate, Transmit,* or *Output.*
- Validate the Report
- If errors are found, then correct the data
- If warnings are found, then review and correct data if necessary
- Save the Report
- Transmit the Report
- Exit the Application

Data Entry

- **Report Fields:**

  To enter data in a field, you need to highlight it. It can be highlighted several ways:

  - Use the tab key to position the focus on a field.
  - Double-click on the field with the mouse button.
  - Press the Up/Down/Left/Right (↑↓←→) arrow keys to go through the fields.

- **Data Entry Field Help:**

  To get help about the information you need to enter in a specific data field, bring the focus on that field and click on *Field Help* (located in the upper right corner of the screen). A help screen is displayed, as shown in Figure 2.4.
The help screen displays the database name, definition, data type, and the report edits of the data entry field. At the bottom of the help screen there is a ‘Print’ button to print the help and a ‘Top’ button to return to top of the scrolling help window.

• Comments:

At the bottom of the data entry screen is a Comments text entry window, as shown in Figure 2.5. This window enables you to enter or edit comments regarding a report.
Validating the Report Data

The Validate option searches for errors and warnings in the currently displayed report. To validate the data, click on the action button, Validate.

If there are any errors and/or warnings, a screen will be displayed listing them. The top section of the screen displays the report’s table name, the state, and reporting date. The middle section displays one or more of three types of errors — fatal errors, errors, and warnings — and a description of them. Each type is described below:

- **Fatal errors**: The system builds in safeguards to prevent fatal errors; nonetheless, the system checks for them. Fatal errors will not allow a report to be saved. Example: If a Michigan data entry user somehow entered Minnesota’s state abbreviation as the state designation, a fatal error would occur.

- **Errors**: These are generally math errors, but may also be impossible entries. Example: Assume two fields are supposed to add to a third field. If the program checks the two fields and finds they don’t add to the third field, this is an error.

![List of Edit Errors](image)

**Figure 2.6 List of Edit Errors**

If there are errors, a message, “ERROR(S) exist. Record can be saved but cannot be transmitted” appears on top of the screen, as shown in Figure 2.6.
• **Warnings:** Warnings occur when expected relationships between two or more items in a report are not found. *Example:* The value in field c2 is usually less than the value in field c1. Other edits compare the value of a field with:
  o the value of the comparable field in the immediate prior period, and;
  o the average value of the comparable fields for the same period in the previous three years.

If there is a significant discrepancy, a message is generated.

Valid data generally pass these “reasonableness” tests, however, data can fail these tests. When data fail an edit, a warning message appears, as shown in Figure 2.7.

![Edit Warnings Table](image)

**Figure 2.7 List of Edit Warnings**

When a warning message appears, check the numerical values. If the numbers are correct, the report can still be sent to the NO.

**Tip:** If you send reports to the NO with warnings, an explanation in the Comments Section will prevent unnecessary questioning of the data by the NO.
**Report Output**

The *Output Action button* allows you to view, print, or save the report. The output is generated from the data that is saved in the database table. When you click on the Output option, a report is displayed, as shown (partially) in Figure 2.8.

![Figure 2.8 Report Output](image)

The user can use the web browser *File* menu and choose:

- **Print**: To print the report
- **Save As**: To save the report

**Tip**: If you have added data or made changes to the report data, you should save the data into the database before generating the output.

Use the Browser *Back* button to go back to the Data Entry screen. The user can exit the application by closing the web browser.