User Manual

Twenty Questions Application Processor

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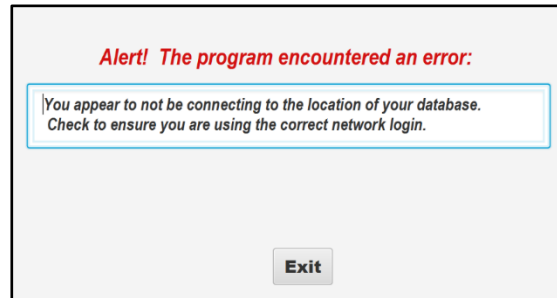
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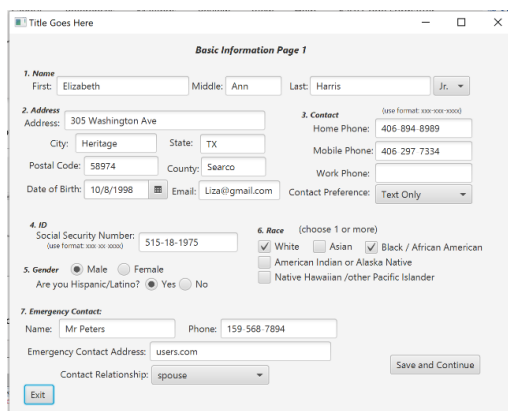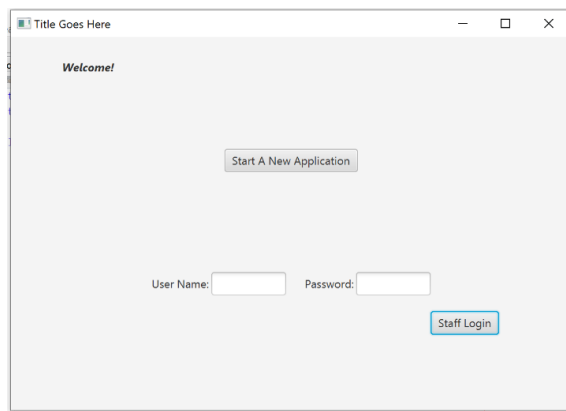
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Description: Twenty Questions Application Software is a user interface program that allows clients to electronically fill out an application. A Client clicks "start application" and then fills out information on three screens, the first two collecting information from a pre-determined application form. The third page is a customizable page where program staff can set up seven additional questions for clients. At the end, when an applicant clicks "submit," the form is saved to a file as a pdf using the client's name and current date. Additionally, data is stored in a database and additional reports in the form of a spreadsheet are available via a staff login. The data is stored in a Microsoft Access database.

Alert Messages: As the program starts, if an alert screen is shown, refer to the Troubleshooting Guide in this manual. The program will not function until a problem is resolved.

Alert! The program encountered an error:

You appear to not be connecting to the location of your database. Check to ensure you are using the correct network login.

Exit

Client User Screens: A client starts by clicking "start a new application"

and then "Save and Continue" to go to page 2 …
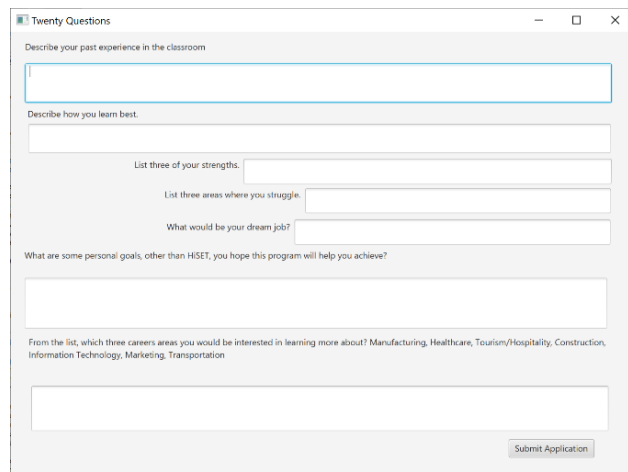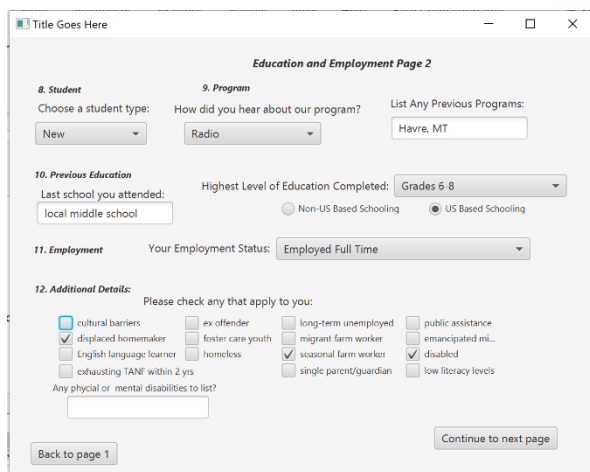
At the bottom of page 2, a client clicks "Continue to next page" and then, after viewing/answering custom screen data, clicks "Submit Application."

The program then shows a "Thank you, your application has been submitted" message with an "Exit" button.

Staff Report Screen: **Staff Login:** Staff enters username and login (1 staff login is provided per location; this is set by the programmer when the program is installed and database file is created.)

This staff interface allows staff to recreate the PDF if needed and create additional reports.   Remember that client data is saved into PDF files upon submission, so PDF applications could be printed from the Generated Reports folder directly.   Staff will have access to the following reports:

✓ An ***All-Client List in an Excel spreadsheet***, saved with a filename that includes current date.
✓ A ***list of client Names and Phone Numbers*** saved in an Excel spreadsheet, using similar dated naming convention as the All-Client list.
✓ **Answers to Custom Questions** in an Excel spreadsheet, established for screen 3 (this report may vary depending on location and how the staff uses page three of the client screen).
✓ A **PDF fillable Application Form**, filled with a client's entered information, saved using the client's name and the date submitted.

Choosing "Change Custom Questions" allows a staff member to set new questions to be presented to clients. Once saved, these questions will be active in the program, on the client's screen, until changed again in this staff screen. All question sets are saved in the database, but only the one previous set is available via the toggle "Get Previous Questions" button. The "Save and Preview" allows staff to see how the questions will appear to the client.

Note: the toggle allows resetting of only one set of previous questions; however, all sets of questions are stored in the database. IF staff wishes to delete a set of questions, or access earlier sets of questions, this toggle can be altered by opening the database in MS Access and making the last two sets of questions the ones to toggle between.

Staff Notes: It is important that all staff using the program understand the following:

- Client PDF files -- *Any re-created staff PDF files will overwrite existing(previous) files.* Since PDF reports are created when a client clicks "submit" during the application process, it is not necessary to log into the staff console to access these reports. They can be opened as fillable PDF files and printed directly from the Generated Reports folder.
- Spreadsheet files – *Any re-created spreadsheets will overwrite former spreadsheets.* IF clients have not been removed from the database, consider a routine to remove clients or back up spreadsheet files before accepting additional applications during an enrollment session.
- Client submission – A client must click "submit" at the end of page two before any data is saved to the database or to a PDF file; any partial data completed is not entered until the entire application is submitted. Page three is created separately and submitted to the database differently.
- Since the database is an MS Access database, it can be accessed directly using Microsoft Access. The program utilizes a front-end file, split as recommended by Microsoft. *Keep in mind that any change to the backend database table names or schema will cause the Twenty Questions program to no longer function.*

Data Flow and Storage: Data is received from the client and stored in a Microsoft Access database in a secured location. Data can then be retrieved via the staff report screen.

Flow of Data

Data goes to database on the network. (for example, using MS Access or MySQL).

Date goes into a spreadsheet file:

Intake screens filled out by clients (Twenty Questions program installed on all computers.)

Staff logs into Twenty Questions to print reports (on staff computers.)

Data populates INTO the PDF application form:

Reports are saved to a specific location or printed.

Installation Notes

The program is designed to be installed on windows machines and run by clicking on an icon. Secure access to folders on the network is pre-set up with the developer and your network staff. Before installing, be sure you've communicated and understand how you are addressing security of client data for your location.

Upon installation, you should record the following for future reference:

Location of database file: _____

Location of client saved reports: _____

Login for staff* to access reports: username -_____   password - _____

*Unless otherwise customized, the program is constructed to provide one staff login credential specific to your location.

Additional Installation Details

Security: Twenty Questions is created with the idea that client data (pdf applications, spreadsheets, and database file) is located within a secured folder on the program's network. It is up to the local network administrators and program director to ensure the security of this folder and monitor who can access it. It is highly recommended that a local "security protocol" be determined and summarized below:

The location of the database is secure because _____
_____
_____
_____
Only the following people can access this location by _____
_____
_____

Additional Notes from the programmer for this location:

Troubleshooting Guide

Error on Screen: " Location of data for this program not found." "Are you logged into the correct network user account?"

This error occurs when the program opens but the pathway (folder or network location) to get to the database file is not found. Check to make sure you are logged into the network account with the privilege to use this program(and the associated database location). Usually, this happens when a user is logged into a network account without access to the secured location of the database.

Error on screen: "Database not connected." "Database File not found."

This error will appear on the screen if the database file cannot be found or has been removed. Check to make sure your database file has not been moved from the location described under installation notes. IF the database file is missing, there is a folder included in the same network location called "backup files" where a fresh copy of the database can be acquired. Database files will be named twntyqstns and twntyqstns_be – copy both files from the backup folder into the correct location. Moving the MS Access file will also require relinking the front end file in MS Access to the backend (be) file. **Steps to relinking:** (..using Office 365, if using older, look for "Linked Table Manager and the steps will be similar, perhaps in a different order.")

> 1) Open the database file twntyqustns.accdb in Microsoft Access
>
> 2) Under the "External Data" tab click on "Linked Table Manager"
>
> 3 Click "Add" and if you wish to include a name, type one, then choose "Access" under the Select Data Source. Choose Ok to go to the next screen.
>
> 4. Find and choose the file twntyqstns.accbd_be   Leave the password field blank and choose "Finish"
>
> 5. On the next screen, choose "Select All" to choose all the tables or each one at a time and then "Ok"
>
> 6. If the first screen already had a linked file from before, return to steps 1 and 2 but this time select the old link by checking the box, then choose "Delete"

Custom errors can be created for each location. If your network requires a special login or account to be used by this program, that could be included in the custom error message to redirect staff to log into the appropriate account.

Program customization: The developer of Twenty Questions is available for limited customization. You may contact her regarding use of this program at the email address below.

About the Developer: *Melinda Teed worked in the Adult Education program in Kalispell Montana. She made a career change because she knew technology and "systems" could be improved and her fascination with such " improvements" led her to pursue a new career in software development. This software is a result of her final, --a "Capstone Project" required by Western Governors University. It is with great enthusiasm that she shares with larger Montana Adult Education Community. Melinda can be contacted at melinda.teed@gmail.com.*