ICF “International HIV/AIDS Alliance in Ukraine”

Automated Records Management System In Harm Reduction Programs SyrEx2

User’s Manual

2011

Table of Contents

1. General Information

1.1.About the program

SyrEx2 is an automated records management system, developed by ICF "International HIV/AIDS Alliance in Ukraine" with financial support from the Global Fund to Fight AIDS, Tuberculosis and Malaria. This program is used for monitoring and recording in HIV prevention programs among all vulnerable groups.

The key functions of SyrEx2+ are the following:

- clients registration;
- recording commodities and services provided;
- recording trainings and other group events;
- reports generation by different criteria;
- transmission and aggregation of data from multiple sources.

Computer Requirements:

- Operating System: Windows XP SP2, Windows Vista, Windows 7, Windows 2008, Windows 2008 R2.
- 100 MB of Free Hard Disk Space (Minimum).
- 512MB of RAM (Minimum) (more if dealing with a large memory base).
- 2GHz Processor and Higher.

The installation package of the program includes the following three files:

- installs the shell of SyrEx2
- installs the database management system i.e. SQL that ensures system operation
- a system configuration (set-up) file (used after installation of SyrEx2 to determine the system usage mode and upload basic settings)

1.2.How to use this manual

This manual is divided into silogical sections:

“Installation and Start-Up Guide for SyrEx2” is a step-by-step manual with a description of a set of actions, which, once completed, allow the user to install and directly proceed to use the system. This section also provides basic recommendations on how to work with the interface in an efficient manner.

“Conduct of database” is presented in the format of a reference guide and contains the most detailed information about the directories, client cards, daily recording and reports generation.

“Other program functions” describes such additional functions as filter and search, data transfer and backup procedures, period closure for information safeguarding and database comparison.

“About the program” is consisted from menu description, interface capabilities and some important points about program usage.

“Technical information” provides general technical requirements and additional possibilities of databases management.

1.3.Terms and definitions

- **Double Click** – a quick double pressing of the left-hand button on the mouse.
- **Toolbar**. Contains buttons for the most frequently used functions. Some functions may not be accessible for the current operating mode of SyrEx2 and the appropriate buttons and menu options will be inactive (marked in grey)

- A reference to a menu choice or a field name is italicized, e.g. *Directories* or *Information* → *About SyrEx*. The arrow between menu items represents a tab. In the example above, in order to look up *About SyrEx*, the user should turn to the *Information* menu.

Attention! In the system, with which you will be working, certain interface elements and names may slightly differ from those presented in this manual. However, this will in no way affect the functionality of the system.

2. Installation and Start-Up Guide for SyrEx2

2.1. Download the installation package of SyrEx2

The distribution kit (installation package) of the program includes the following three files:

- Syrex2Malay.setup.2.0.1.XXXX.msi – installs the shell of SyrEx2 (XXXX is the SyrEx2 system update version);
- SQLInstall.exe – installs the database management system i.e. SQL that ensures system operation;
- _syrex2en-malaysia.XXXXXXXX.signed.xcfg – a system configuration (set-up) file (used after installation of SyrEx2 to determine the system usage mode and upload basic settings). XXXXXXXX is the system configuration update version The name of the configuration file may differ, but it will certainly be a file with a *.xcfg.xml extension

2.2. Installing SyrEx 2+ over previous versions

If there is no other version of SyrEx2 program on the computer skip these part and go to the number 2.3.

1. Run the SyrEx2 system and make a backup copy of the database[1].
2. Delete the old version of SyrEx2.

The deletion procedure is done as follows. Go to the Windows menu *Start* → *Settings* → *Control Panel.* A window will show up with the option "Add or Remove Programs" or "Programs and components (Win7). Double-click this item.

Find SyrEx2 on the list and click "Remove". Wait a few minutes. Now the program has been deleted. Close this window.

2.3. SyrEx2 installation

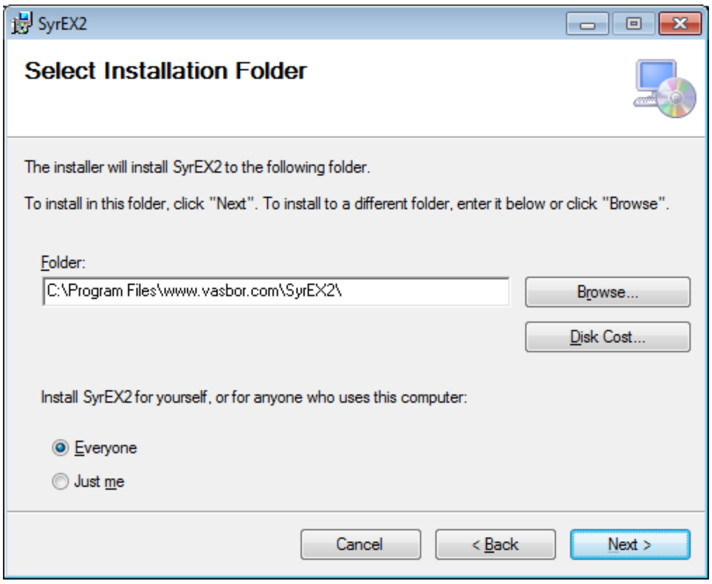
Run the Syrex2Malay.setup.2.0.1.XXXX.msi file.

Note: Only computer administrator may proceed the installation. Some Windows versions require clicking on the installation file with the right button of the mouse and choosing "Run as administrator".

This window will appear. Click the "Next" button.

[1] The backup procedure is outlined in para. 4.2.1. "Backup copies".

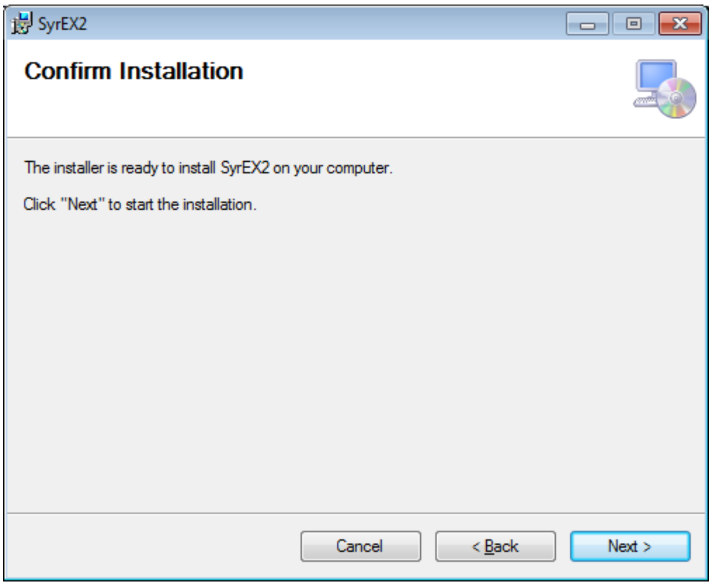
This window will appear. The user is strongly advised against changing the settings of the installation folder properties.



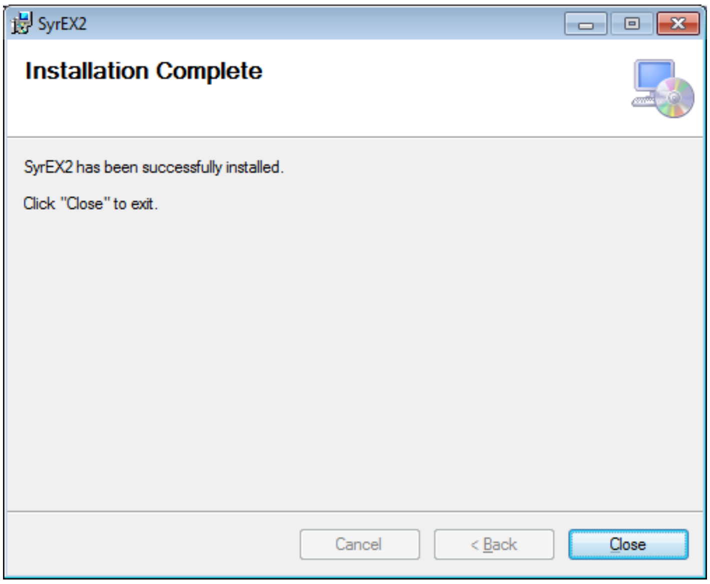
Click *Next* to complete installation.

Note: for some systems the default disk can be different (for example, **D:\Program Files\ www.vasbor.com\ SyrEx2**). In this case, it is also recommended to continue installation with the options offered by the program.

Click *"Next"*. Please wait until installation is complete. This process may take up to 15 minutes.



Once complete, the following window should appear:

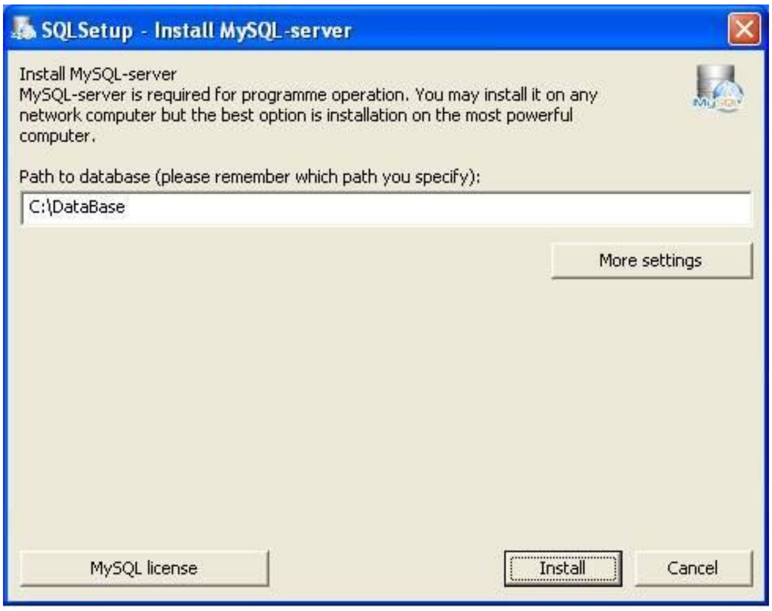


Please click the *"Close"* button.

The SyrEX2+ icon will appear on the desktop for system start-up.

2.4.SQL installation

Run the SQLInstall.exe file. This window will show up.



Note: for some systems the default disk can be different (for example, E:\DataBase). In this case, it is also recommended to continue installation with the options offered by the program.

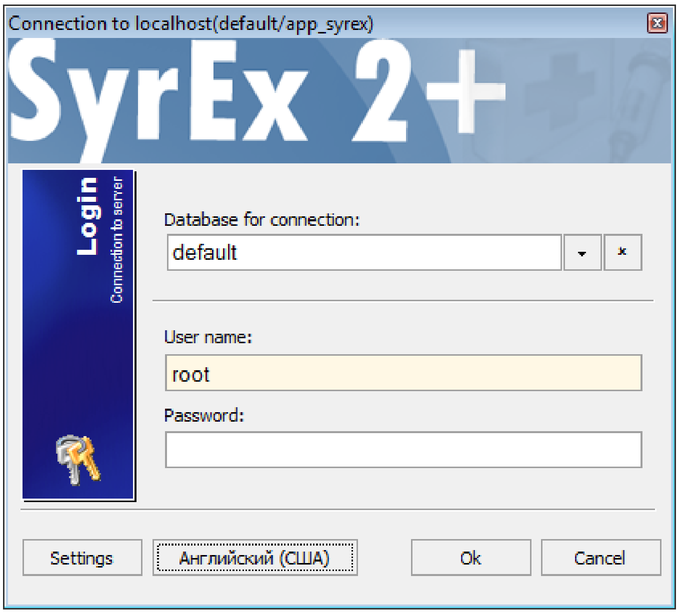
The user is strongly advised against changing the value of the field (database directory - C:\DATABASE).

Regarding on the database size which will be run on the current computer you may change the SQL settings. This will increase the speed of data processing. For this click on *More settings* button, choose the size of database and click OK.

Click *Install* to complete installation. Please wait until installation is complete, and then click "*OK*". With this done, you can boot up SyrEx2 with a double click on the SyrEx icon on the desktop.

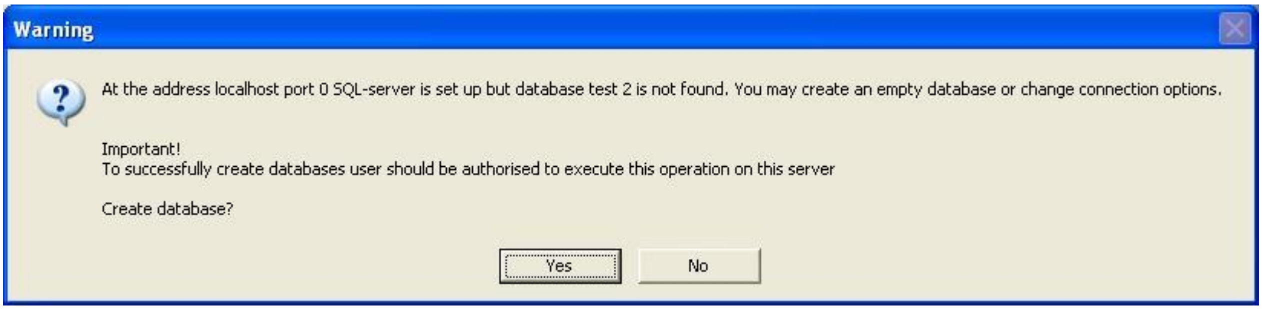
2.5.First Start-Up

After the first system start-up, the following window will appear.



Click "OK".

After this the warning message will show up:

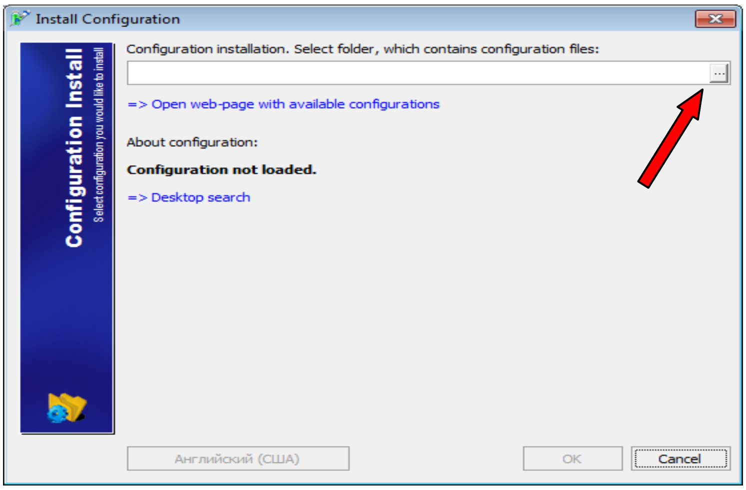


Click “Yes”. Now the message will appear:

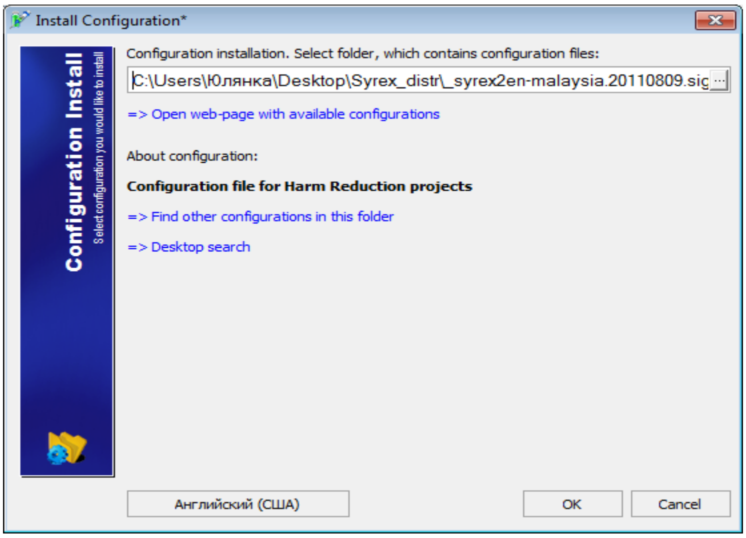
Click “OK”. Now the database connection window will show up again. Click “OK” again. At the first start-up the program will take several minutes to open.

2.6.Configuration Set-Up

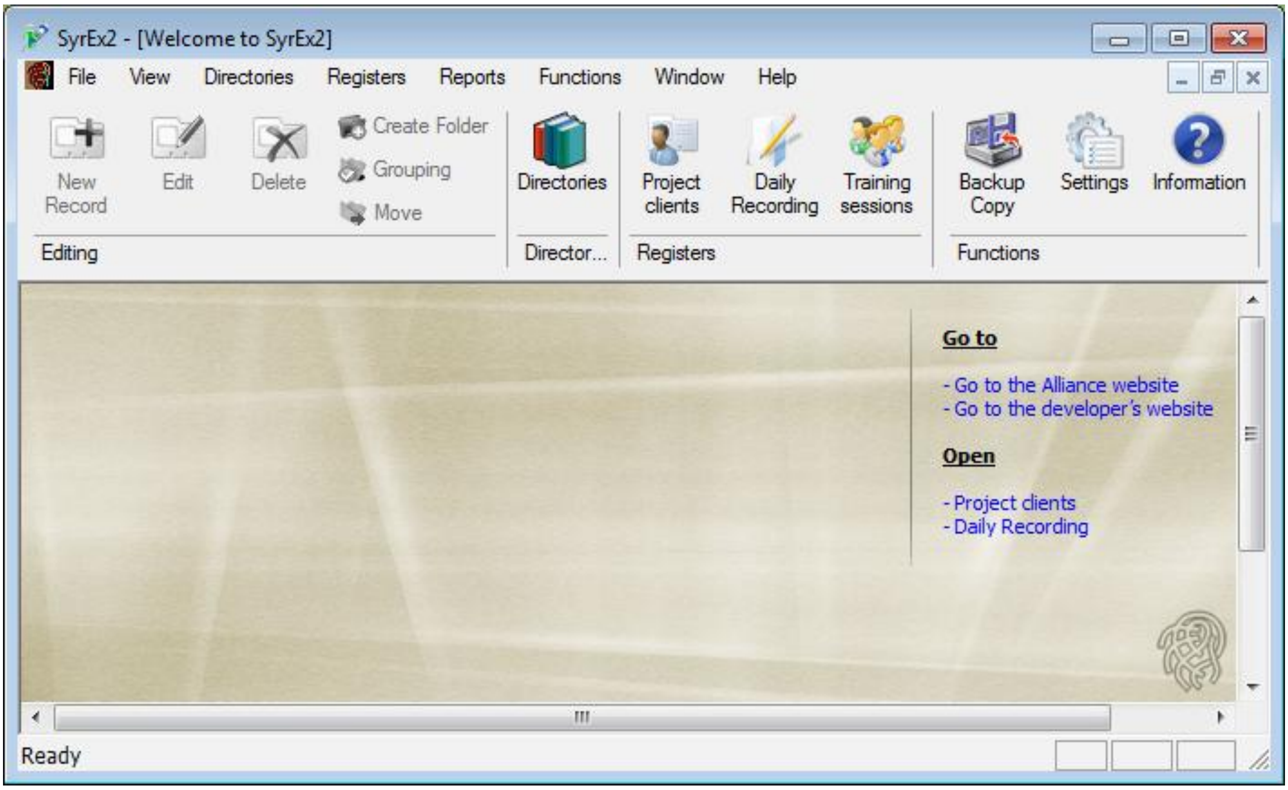
In order to be able to work with the program it is necessary to specify the **configuration** used (system operating mode and basic settings). The *xcfg.xml configuration file is included in the installation package. At the first start-up the following window will show up. Click the configuration folder select button (shown with a red arrow) and find the configuration file included in the installation package.



Click “OK”. It may take several minutes to download the configuration file.



Now the main system window of SyrEx2 will open (after start-up the “backup copy is out of date” message may appear on screen. Click “OK”).


SyrEx2 - [Welcome to SyrEx2]
File
View
Directories
Registers
Reports
Functions
Window
Help
New Record
Edit
Delete
Create Folder
Grouping
Move
Directories
Project clients
Daily Recording
Training sessions
Backup Copy
Settings
Information
Editing
Director...
Registers
Functions
Go to
- Go to the Alliance website
- Go to the developer's website
Open
- Project clients
- Daily Recording
Ready

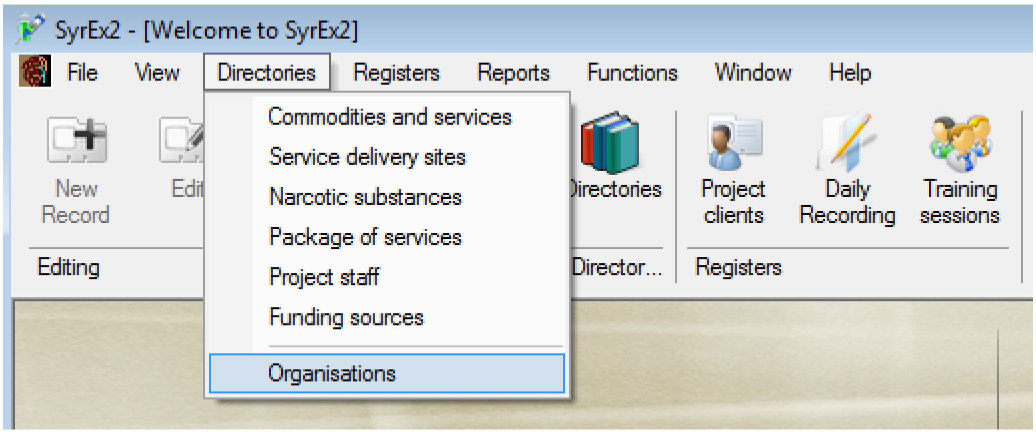
3. Conduct of database

Database loading consists of two general parts: directories filling and documents entering. After the program has been installed, it must be adapted to suit the specifics of your organization; for this purpose, you must complete the Directories. Information from them is used for completing the *Daily Recording Sheets*, client cards and report generation.

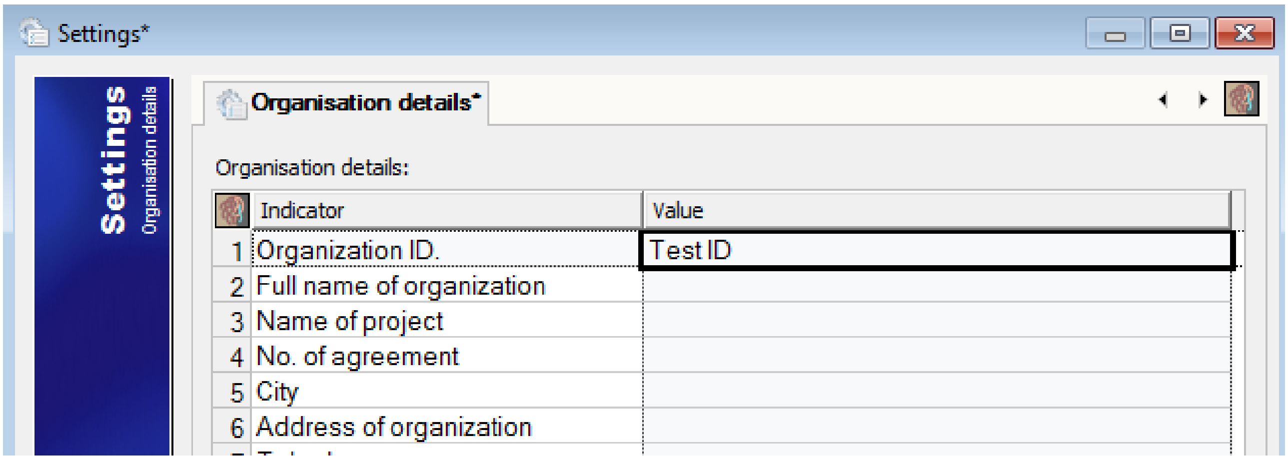
There are several types of directories and two types of documents: daily records and training sessions. We'll study them below.

3.1.Directories.

3.1.1. <u>Organization directory</u>



As soon as you open that window the Information about organization appears.



Before entering data in the database the Organization ID should be entered. This can be any code made up of letters of the Latin alphabet and digits which will be unique for your organization, and cannot be re-applied by another user of the system. If your organization is working <u>in several localities</u> <u>(or in the city and the region)</u> and you are planning to maintain separate records, then your organization IDs must be different.

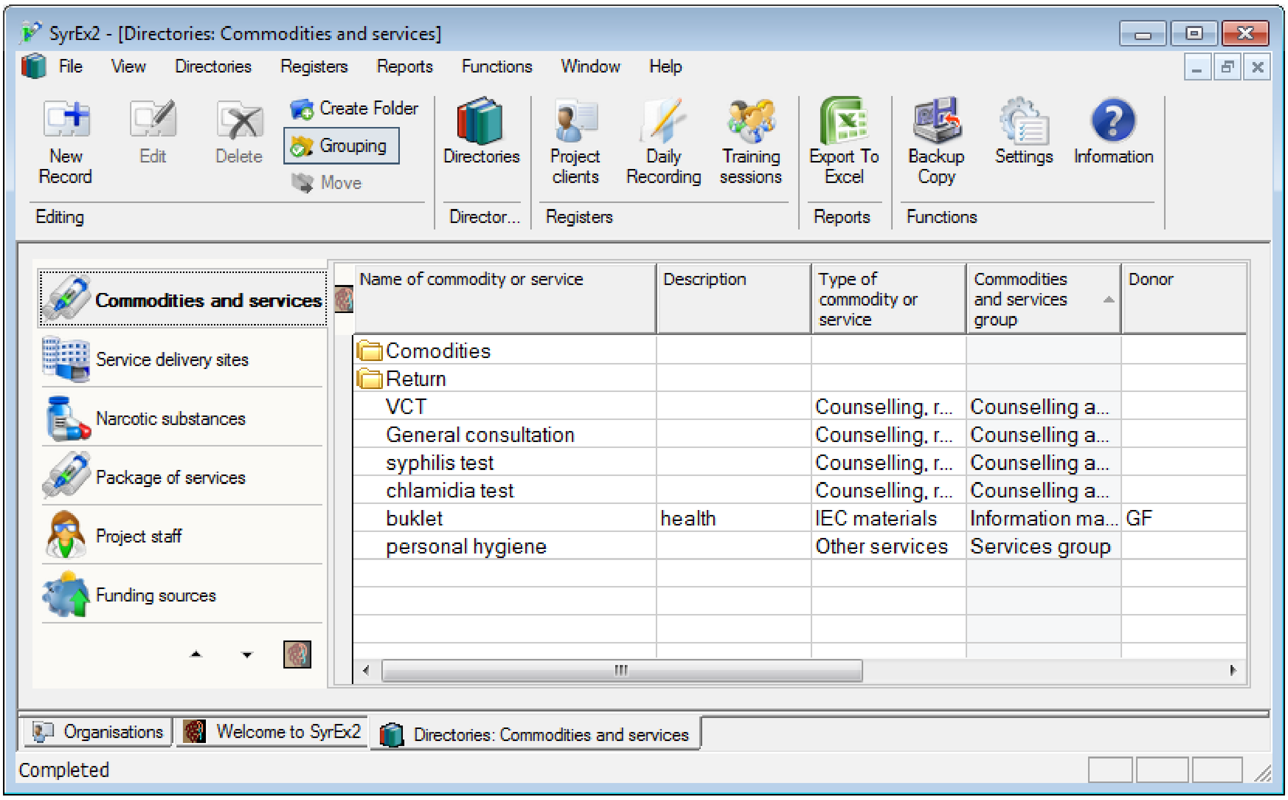
In addition to completing the REQUIRED field "Organization ID", it is recommended to complete the other fields as well. Data in the other fields can be entered in any form. This information is filled only ones, but you may change it later if you need.

Once complete, please click "OK".

The organization directory shows the list of organizations whose information is included in the current database. As usual only one organization will be in a list.

To reach other directories select the menu option *Directories*, or click the button 

on the toolbar. This window will pop up:



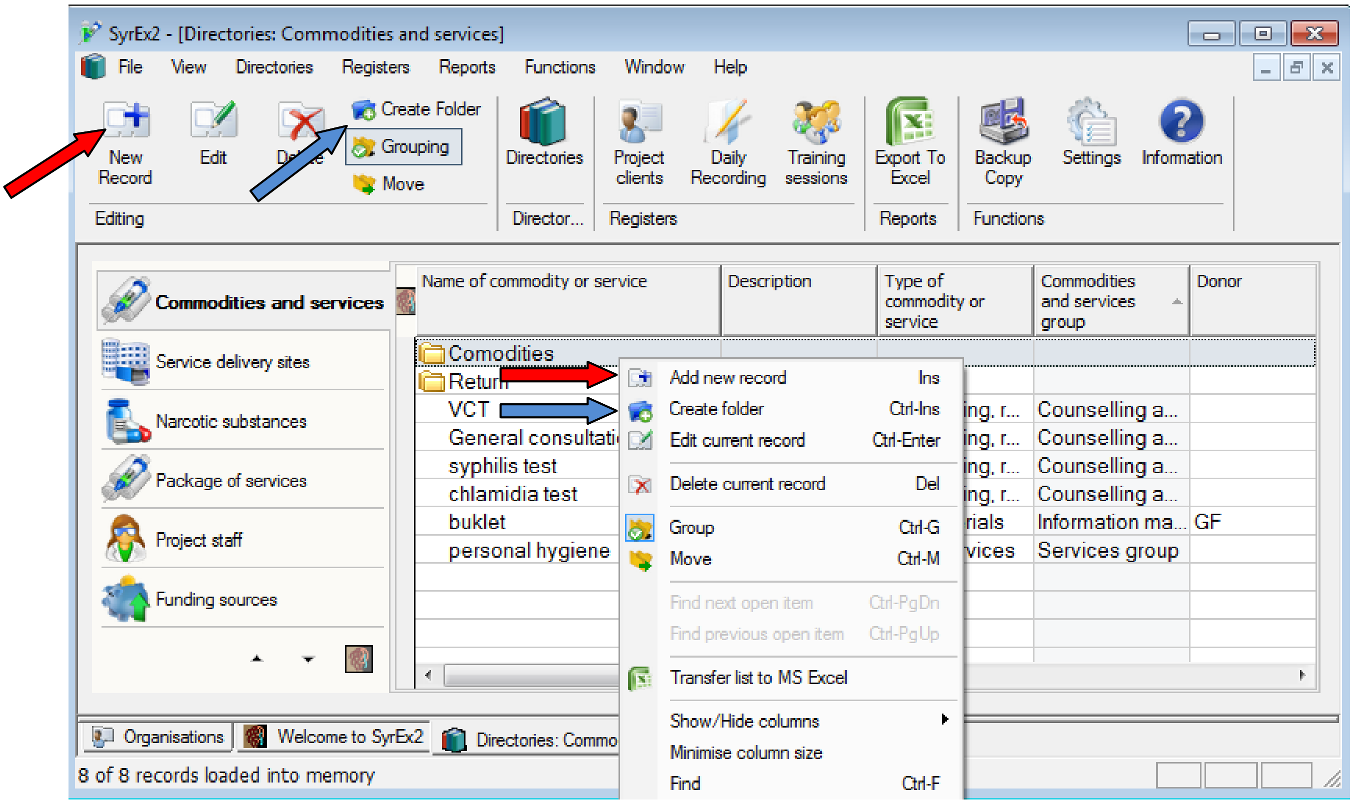
The left-hand panel represents a list of all available types of the guides:

- Commodities and services
- Service delivery sites
- Narcotic substances
- Packages of services
- Project staff
- Funding sources

You may navigate from one section of the directory to another, clicking on the name of the relevant section on the left-hand panel. On the right-hand panel the current contents of the directory are presented in the form of a list.

In order to create a new record (whenever possible), you can use the button 

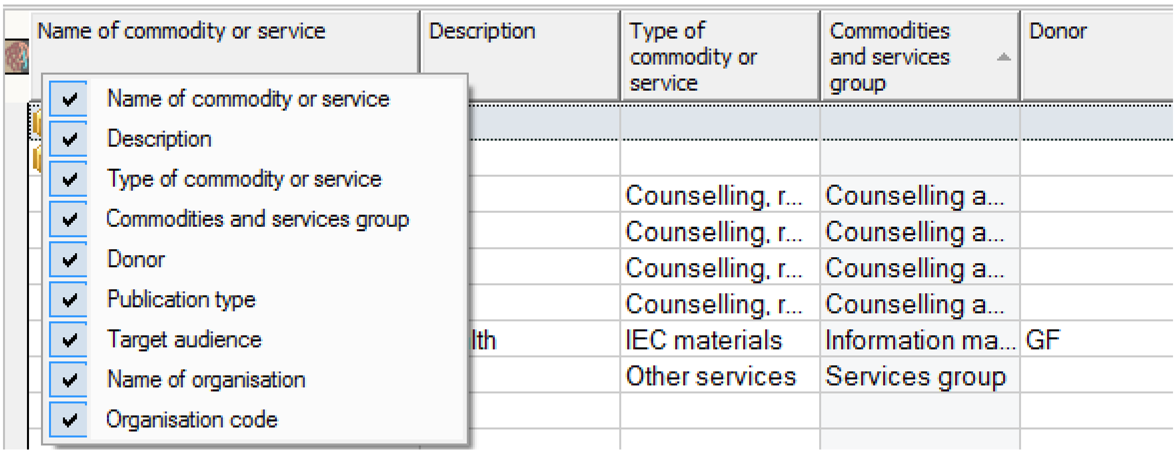
on the toolbar, or use the shortcut menu available after clicking the right-hand button on the mouse (both options are marked with red arrows in the figure), or double-click any blank space in the table, or click the Insert button.



In order to create a folder you can use the button on the toolbar or the shortcut menu that appears after clicking the right-hand button on the mouse (both options are marked with blue arrows in the figure).

Using the folders you can group records in the directories at your convenience. For example, you can create one folder for all handouts and another for all services. Both handouts and services are a part of one directory.

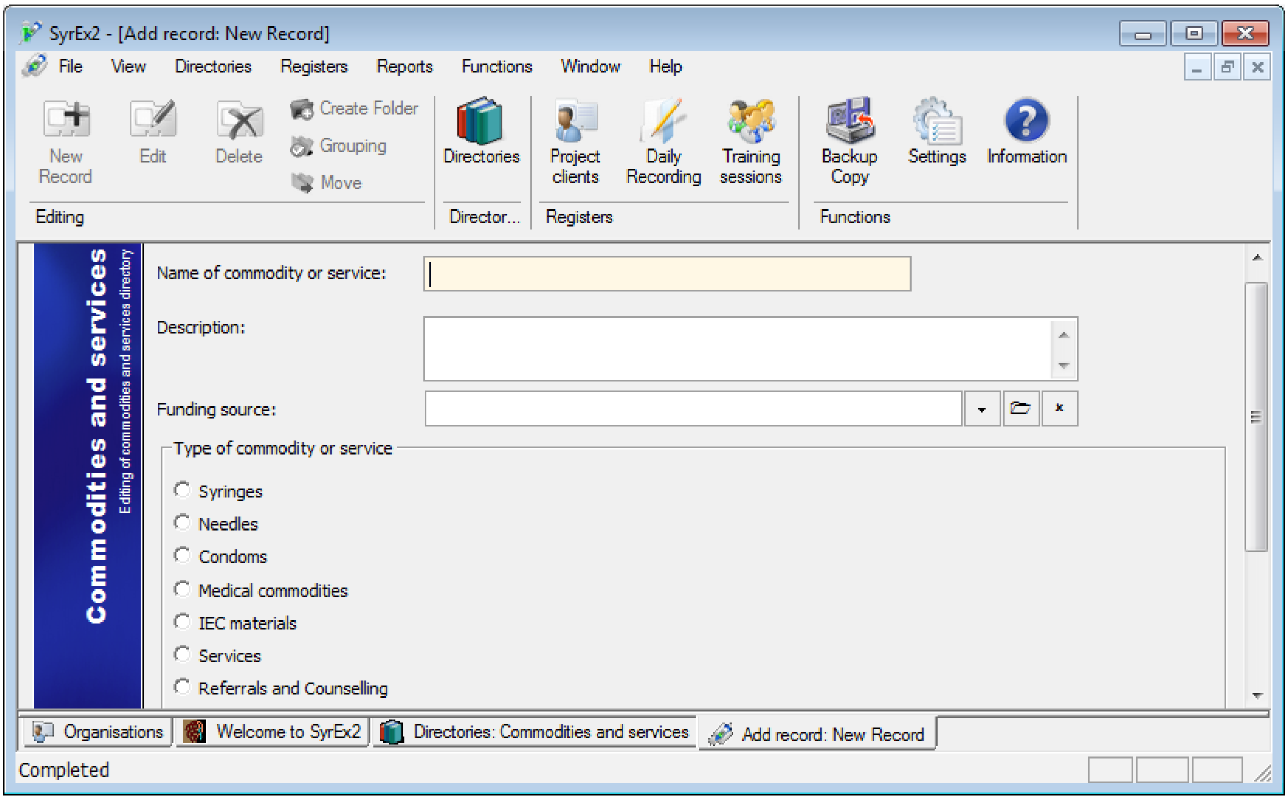
For each list in the section "Directories" the set of columns shown can be set up through the shortcut menu (click the right-hand button on the mouse in the list of fields displayed):



3.1.2. Commodities and services

In this section you must create a separate record for each of the consumable and information material distributed by your organization and for services rendered.

When creating a new record in the guide for handouts and services you will see a window like this:



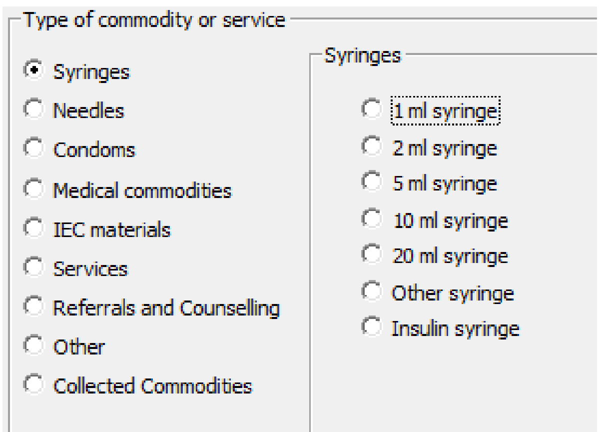
Specify the name of commodity or service in the field of the same name. Add a description and a funding source, if necessary.

Attention! The funding source is selected from the list formed in the directory titled “Funding source”[1]. We recommend that you complete this guide before you proceed to fill in other commodities and services.

Make sure to mark the group to which this commodity or service belongs. There are a total of seven groups, and there are subgroups inside each of them. You also have to indicate the subgroup to which this commodity or service belongs.

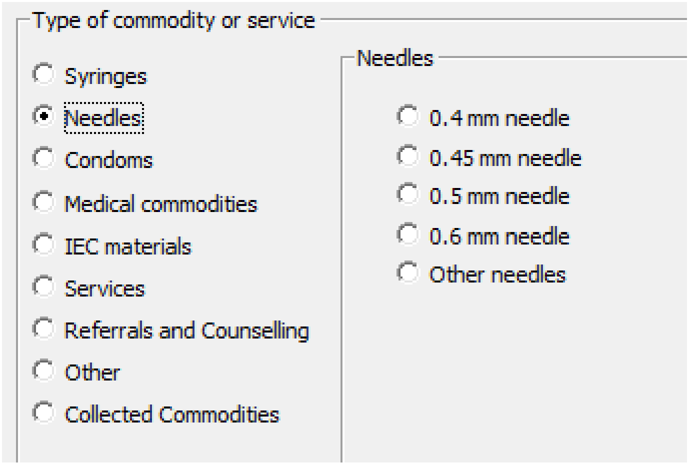
Groups and Subgroups:

- Syringes. Mark the subcategory corresponding to the type of syringe.

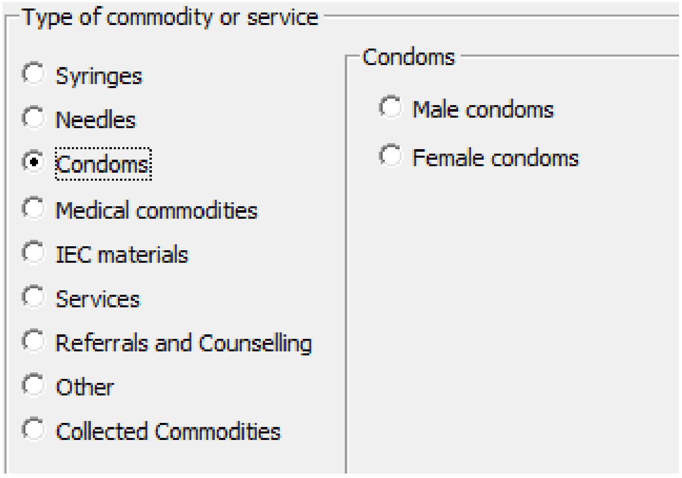


[1] Detailed description of this directory is given in para. 3.1.7.

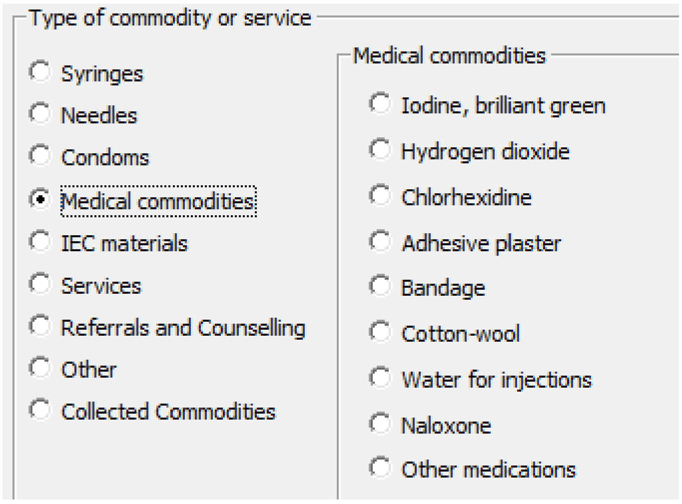
- Needles. Mark the subcategory corresponding to the type of needle.



- Condoms. Mark male or female condoms

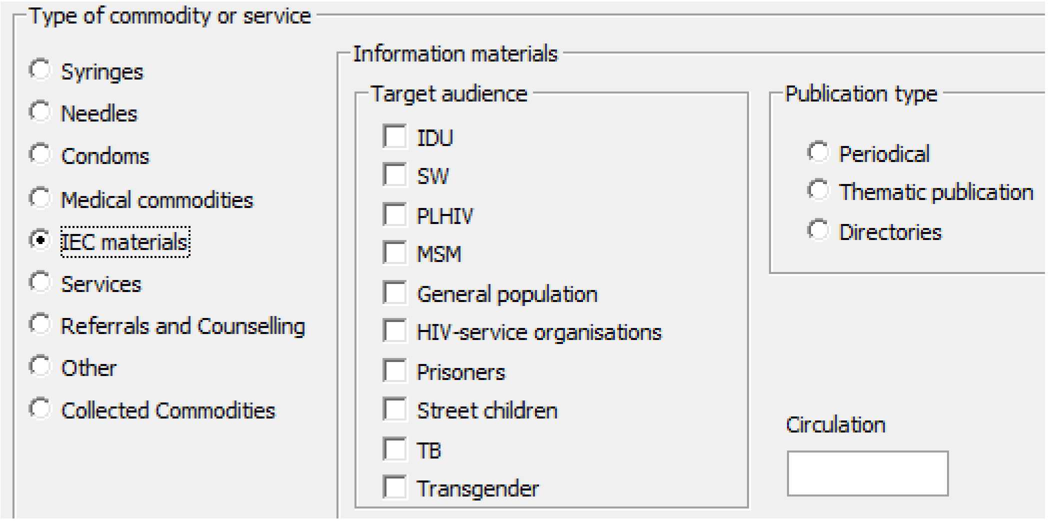


- Medical commodities. Please note that this category includes many types of medical commodities. Select the one that most matches the type of commodity you specified. If you cannot find an appropriate category, mark the last item as “Other medications”.



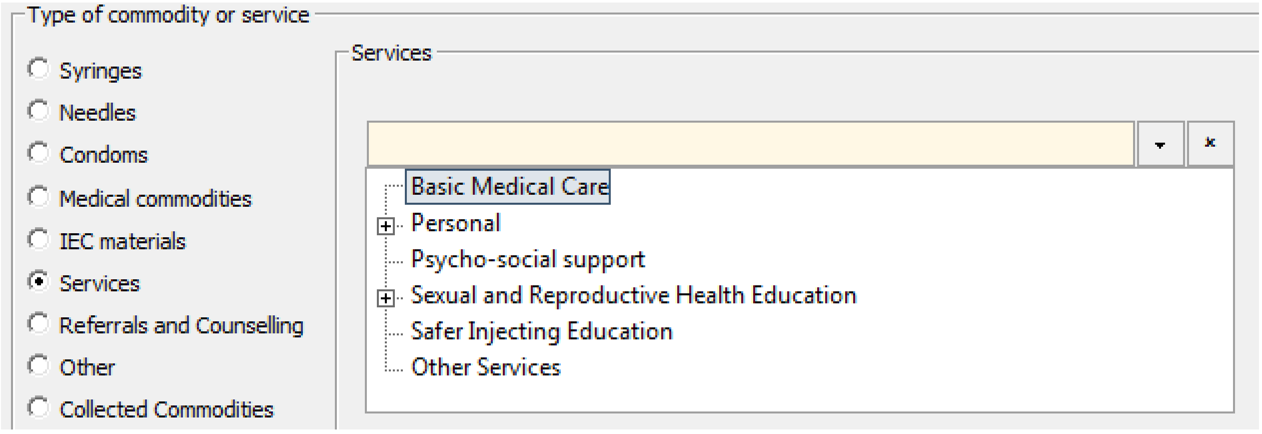
- IEC materials. This section specifies all types of printed materials distributed through your project. This includes both the materials that you developed and published independently as part of ongoing projects and the materials that you received from other organizations for distribution purposes. Indicate the target audience of the publication (several groups can be marked) and the type of publication.

  Attention! Circulation numbers should be indicated ONLY for your own publications. If the printed material has been obtained from another organization, please leave the field blank.

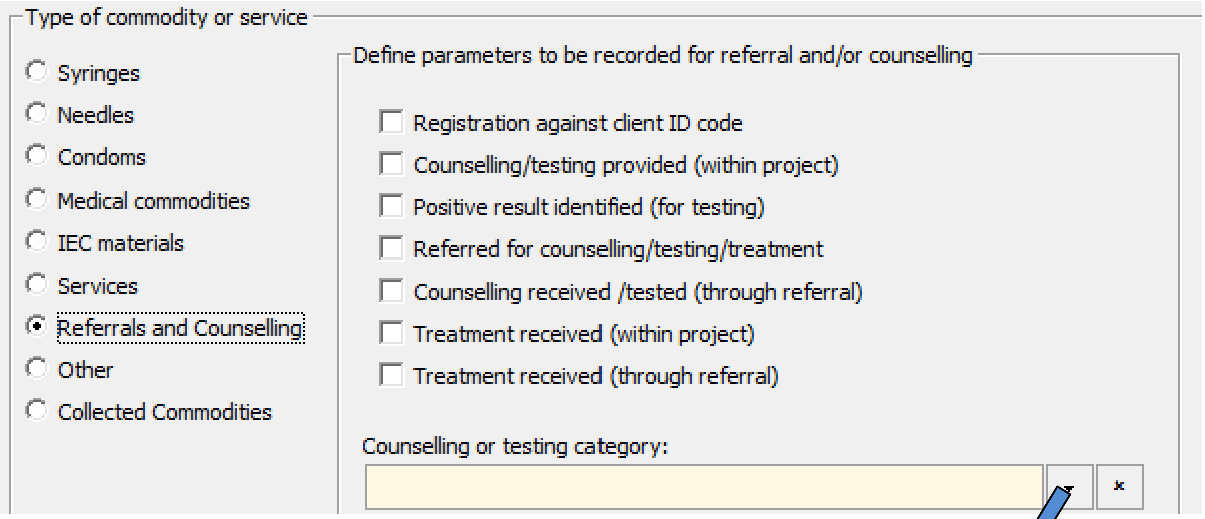


- Services. Select one out of the types of services indicated: basic medical care, personal (subcategories: personal hygiene, self-assessment risk form, other personal), Psycho-social support, Sexual and reproductive health education (subcategories: safer sex and STI prevention education, family planning, other SHR education), safer injecting education, other services. If no option matches, indicate “Other”.

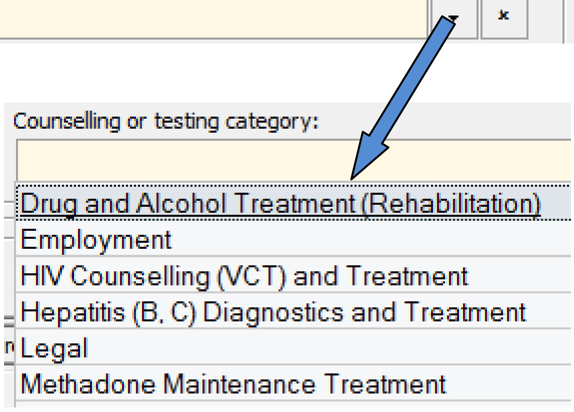
  Attention! Inside this type of services please do not indicate counseling, testing and treatment (including referrals). They are covered by a separate type of service (next section “Referrals and Counseling”).



- Referrals and Counseling. Under this type of service, counseling is regarded from a broad perspective, as a process, which may potentially include referrals for testing and treatment (in the case of medical counseling) and the records of results of such referrals. In the event of non-medical counseling (e.g. “Legal Counseling”), the categories “Testing” and “Treatment” are not relevant.



Attention! From the long list of categories available, select a category that most closely corresponds to the type of counseling offered.



After selection of a category please be sure to mark **the parameters of this referrals and counseling service**, corresponding to appropriate practices of your organization.

"Registration against client ID code" signifies that this counseling (and subsequent results of testing and treatment if marked) will be offered based on an **ID code**, i.e. each event of counseling, results of testing, etc. shall be brought into agreement with the ID of an individual project client. Without this mark you will be able to enter the total number of counseling regardless particular clients.

"Counseling/testing provided (within project)". This check box is marked if the project staff provide counseling and/or testing independently (in the case of non-medical categories, for instance, "Legal Counseling", this option should be understood as simply "counseling" and the word "testing" must disregarded). This category includes, among other things, counseling with further quick HIV testing, provided by the organization independently without any referrals.

"Positive result identified (for testing)". Regardless of whether the testing service is directly provided by your project (as in the example of quick HIV testing), or you provide a referral (as in the case of referral to a STI clinic for syphilis testing and treatment), this option is marked if you are in a position to monitor clients (or their numbers), who tested positive. This option is marked only for medical services.

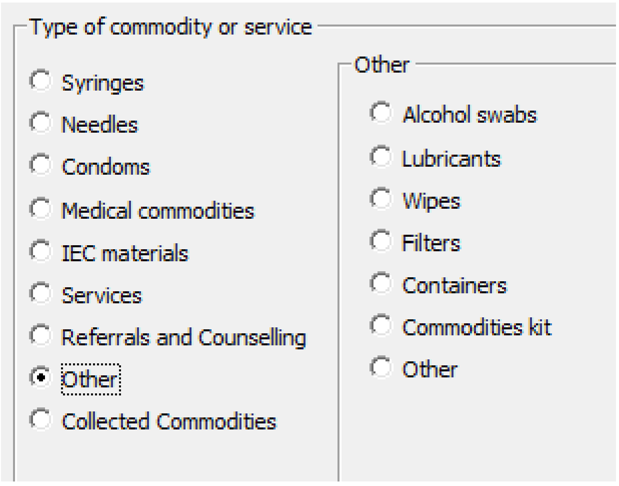
"Referred for counseling/ testing/ treatment". Please mark this check box if the project staff members furnish clients with referrals to other service providers for counseling, testing and/ or treatment. For example, if your organization refers clients to STI clinics for syphilis testing and treatment, if they have tested positive.

"Counseling received/tested (through referral)". Mark this check box if your project provides referral services for this type of counseling, and you have opportunity to monitor clients (or their total number), who received counseling/testing at the place of referral. For example, a STI clinic supplies you with information about clients (or their numbers), who have arrived through your referral and received counseling/testing. Here as before, "testing" refers only to medical services. In the case of non-medical services, this item should be read as "Counseling received (through referral)".

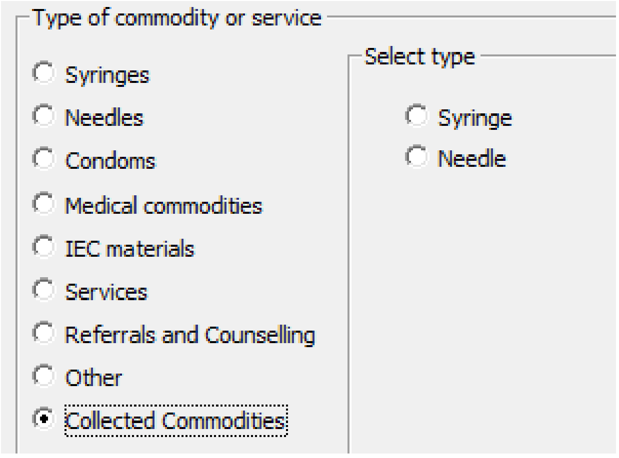
"Treatment received (within project)". Mark this option if, based upon testing results, in the case of testing positive, treatment is provided by your project independently. This option is marked only for medical services.

"Treatment received (through referral)". As in the case of "Counseling received/ tested (through referral)", this option is marked if you are in a position to obtain information about the list of clients (or their numbers), who were referred by you and showed up seeking medical attention, and who, tested positive and received treatment. As an example, a STI clinic informs you about clients (and their numbers), who have been referred by you and received treatment after testing positive. This option is marked only for medical services.

- Other. Please note that this category includes different types of commodities. Select the one that most matches the type of commodity you specified. If you cannot find an appropriate category, mark the last item as "Other".



- Collected Commodities. Within this type there two subitems: "Syringe" and "Needle". Enter the commodities, collected/ exchanged through your project, into the directory.

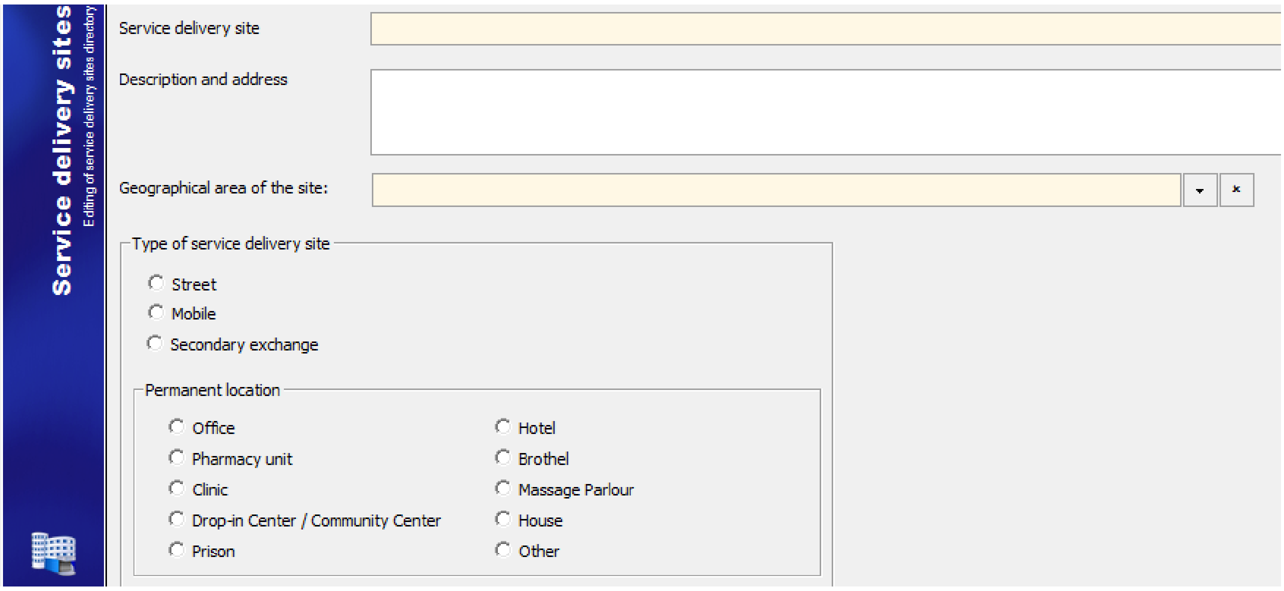


For each of the commodities or services offered you can select **"Hidden"** (left-hand corner at the bottom of the screen). This option will enable you not to see the commodity or service (the same as other directories' items) that ceased to be of current relevance and need not be specified in the Daily Recording Sheets. Using this function, you can shorten the list of commodities and services shown (for convenience sake), while preserving records of distribution of this commodity (offering this service) in the past periods. If the project goes back to distributing this commodity/ offering this service, you can remove the "Hidden" checkmark, and this record will be shown in the list again and available for records keeping purposes. In the list of the directory the record will be displayed at all times.

3.1.3. Service Delivery Sites

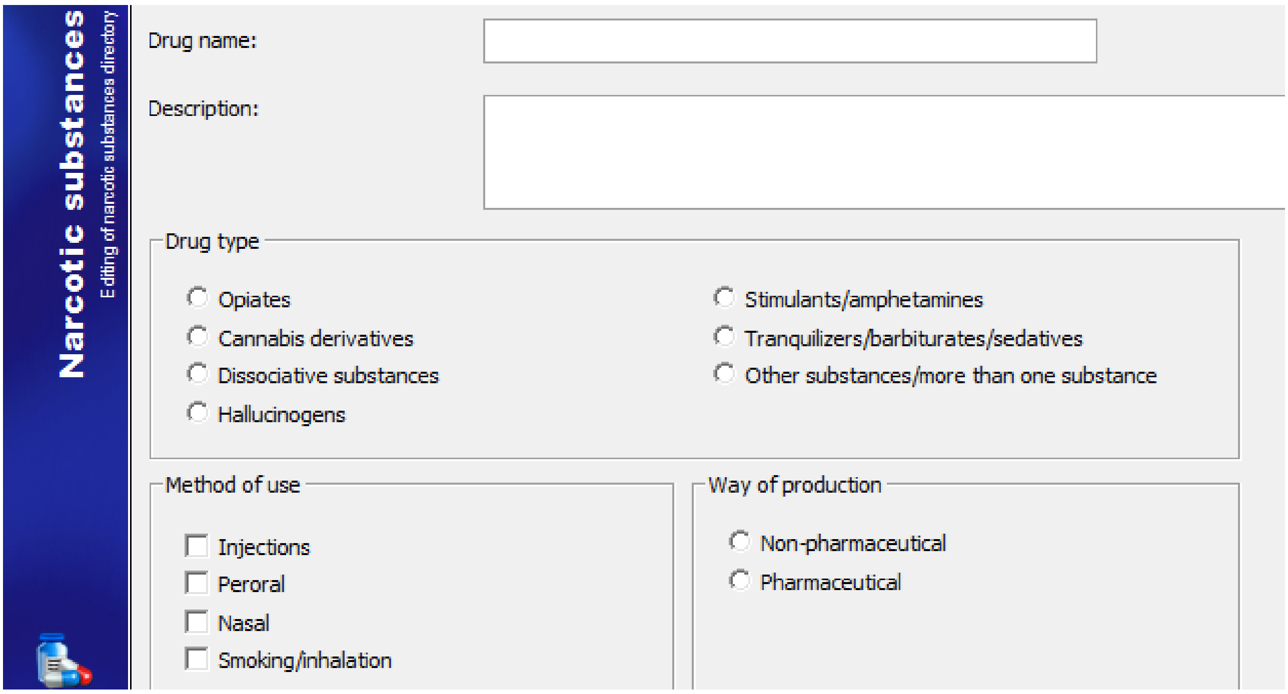
Please specify service delivery sites operating in your organization by stating their geographical area and type.

For this directory the "Hidden" function is also available for designating the service delivery sites, which were in operation before, but then closed down temporarily or permanently.

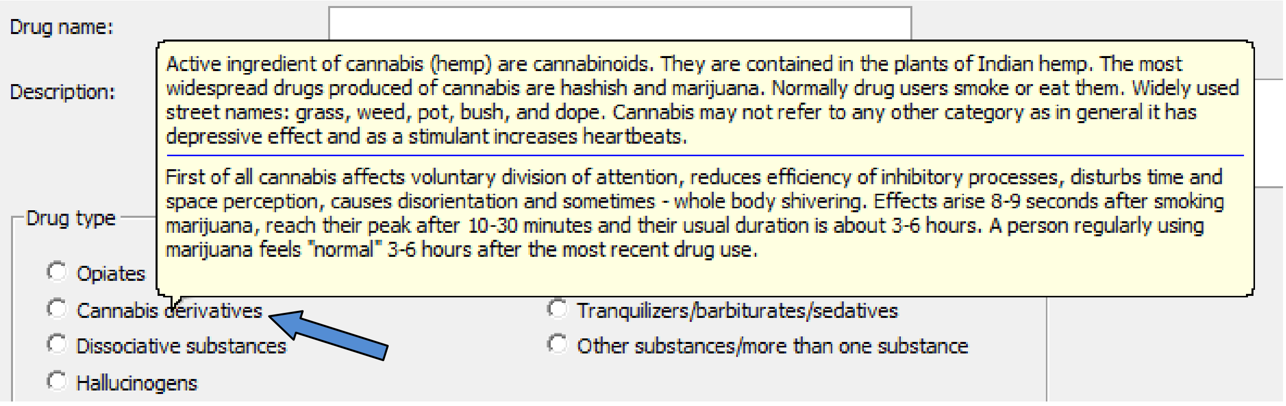


3.1.4. Narcotic Substances

This directory should include the list of narcotic substances commonly available in your region. In the *Drug name* field you can use the slang term/ common name of the drug. This will simplify the completion of client cards. In addition to its name, for each substance it is necessary to indicate the type of drug, the method of use and the way of production. Add a description, if possible.



Attention! There is a pop-up help message for each item and to see it all you have to do is keep the mouse pointer over the option of your choice for several seconds.



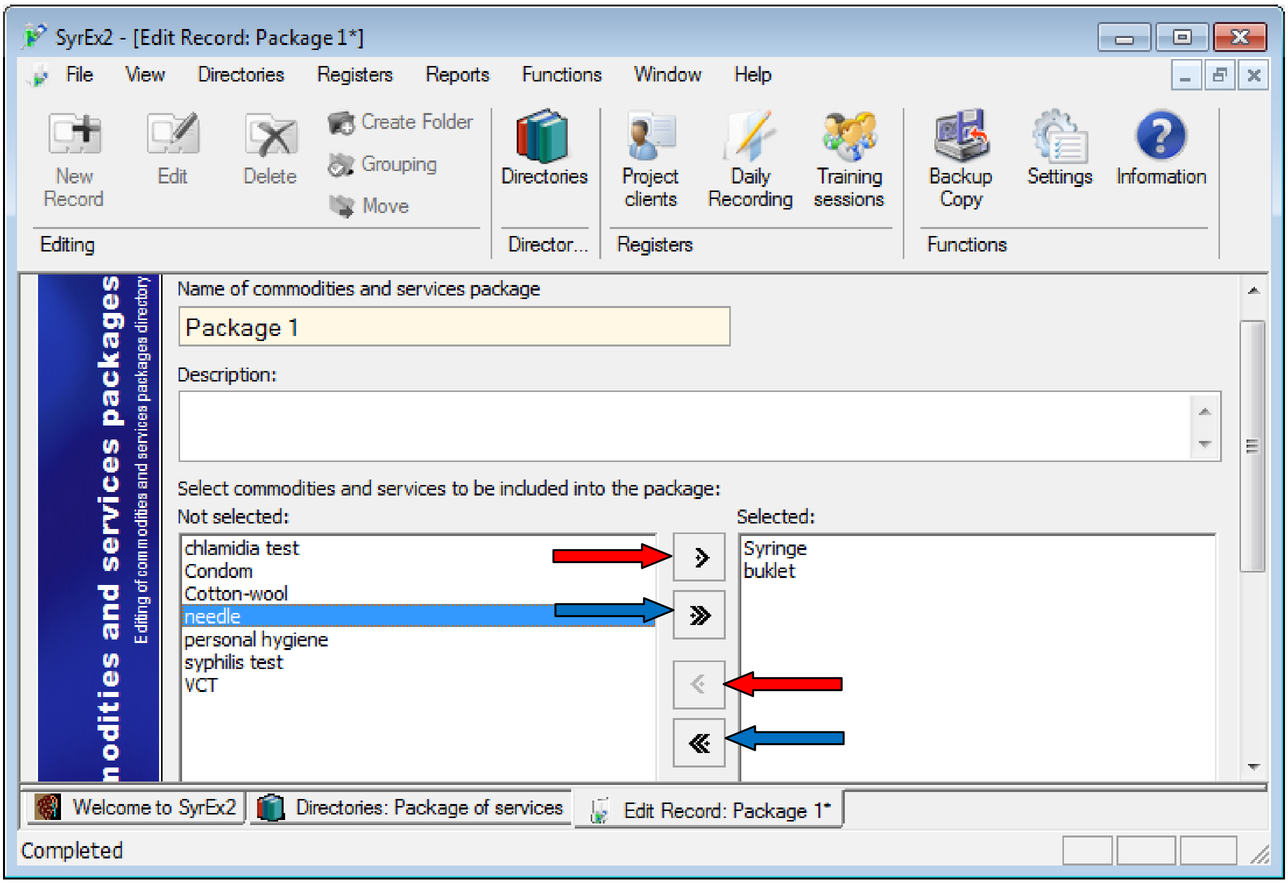
For this directory the “Hidden” function is also available for designating records which are temporarily or permanently out of use.

3.1.5. Package of Services

This directory allows you to generate an unlimited number of various packages, which your organization provides for different vulnerable groups in different periods of time at different service delivery site, etc.

This helps the user to save time spent on filling in *Daily Recording Sheets*, as you can add in all the commodities and services, making up a package, into the register and not add them in one by one.

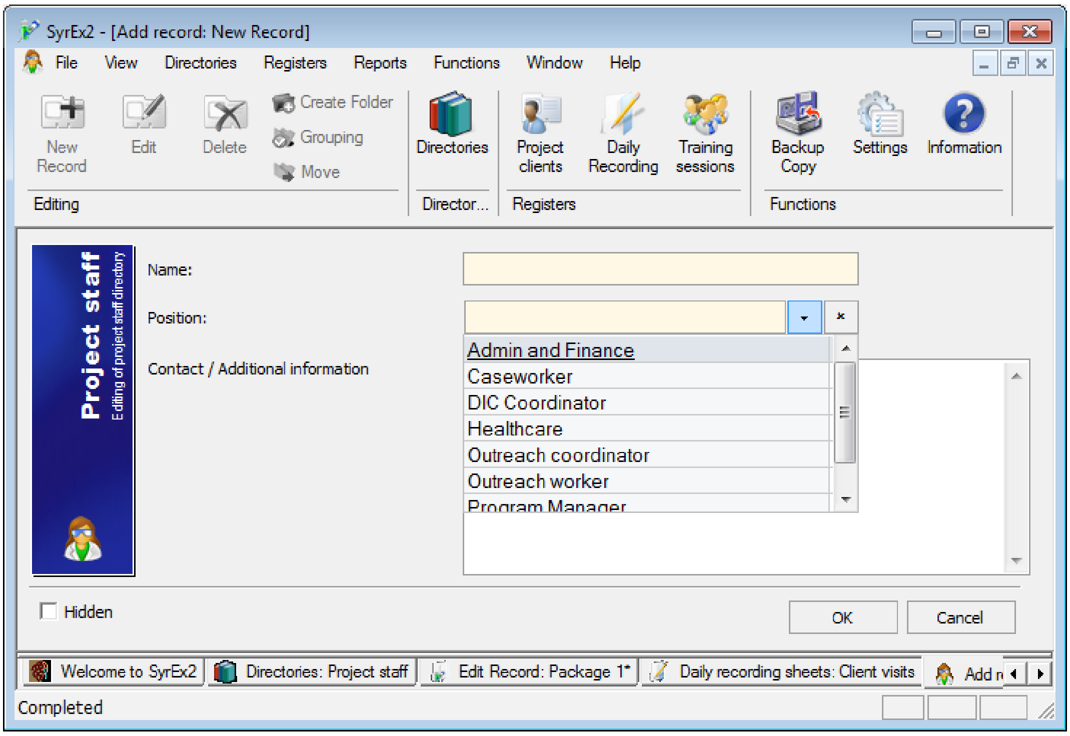
The buttons marked by the red arrow allow you to add and remove commodities one by one. The buttons marked by the blue arrow add and remove all elements of the list simultaneously.



3.1.6. <u>Project Staff</u>

In this section you must specify all staff working in your organization. Volunteers who help social workers at service delivery sites, counseling and medical personnel engaged in the project, must also be mentioned here. As you complete *Daily Recording Sheets* in the dropdown menu *Worker*, you can select up to three of them. Please also choose the staff position from the list.

For this directory the "Hidden" function is also available for designating records, which are temporarily or permanently out of use.



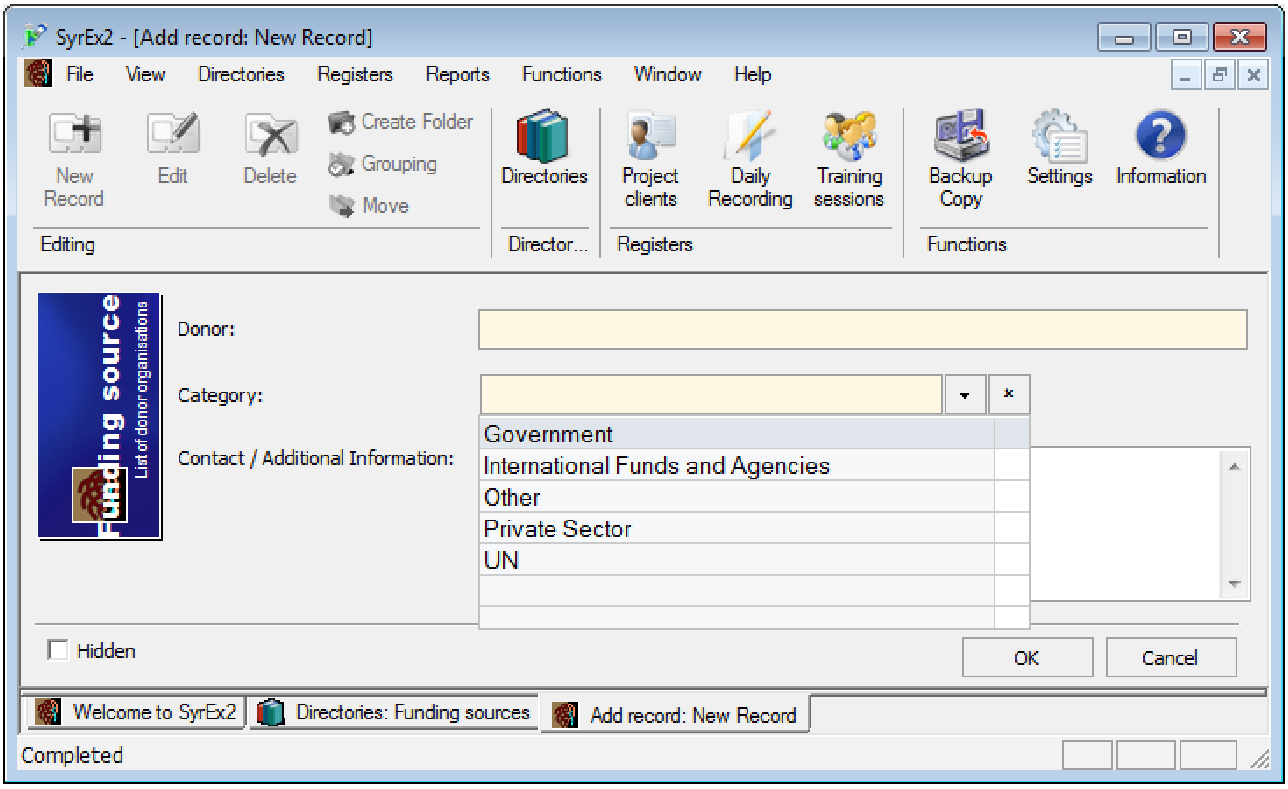
3.1.7. Funding Sources

It determines the list of funding sources for services and commodities distributed and trainings provided. It is used in completing the directory *Commodities and Services* and records of *Training Sessions*.

In the dropdown menu “Configuration Group” the following options are available:

- Government;
- International Funds and Agencies;
- Private Sector;
- UN;
- Other.

For this directory the “Hidden” function is also available for designating records which are temporarily or permanently out of use.

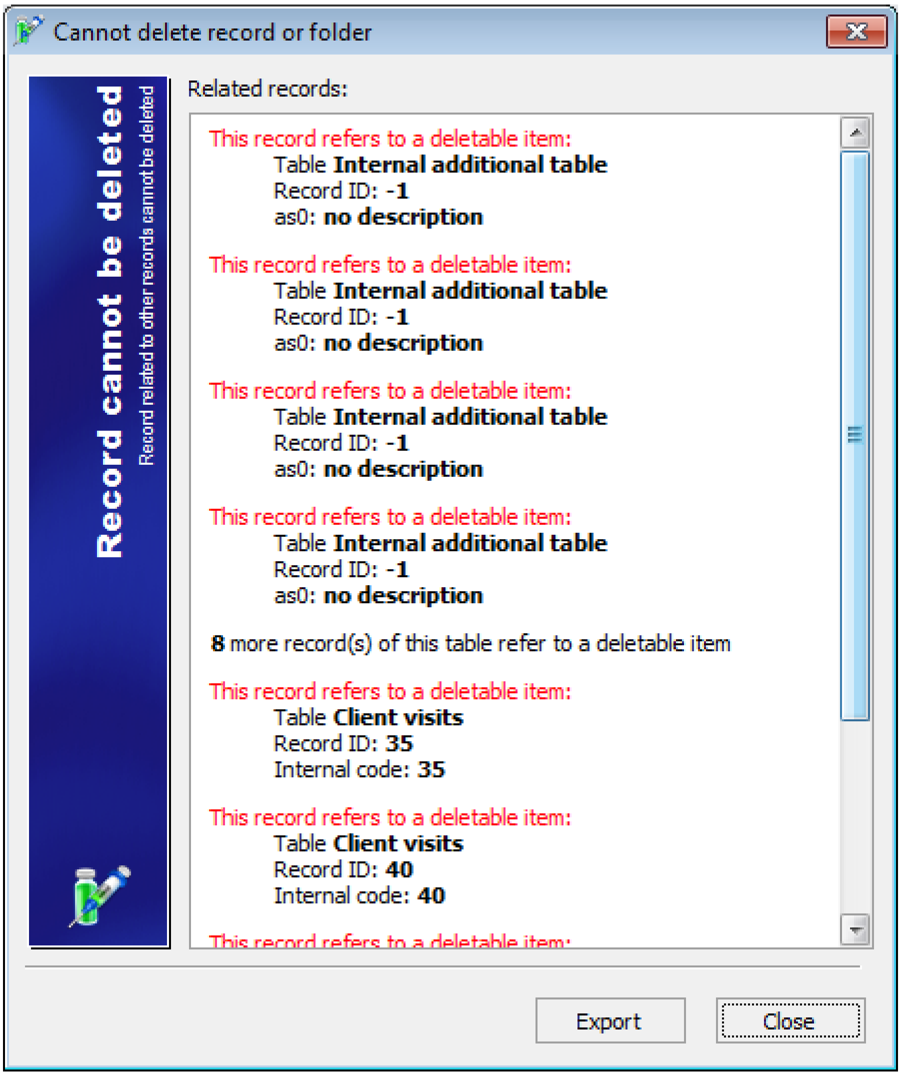


<u>Attention!</u> In order to avoid errors and inaccuracies in the reports it is extremely important that the directories should be completely filled in **<u>before you start to make records</u>**. Subsequently, it is strongly recommended **<u>to avoid editing</u> the already existing records in the directory,** except when the editing is done to add data to or correct inaccuracies in the record, leaving its substance intact.

Editing procedures **can cause distortion of database information** relevant to this section of the guides. Do not delete and do not update the items in the directories that you don't need; add a new item instead of editing the existing one. For current records that you don’t need ane more use the “Hidden” function.

Example: Social worker A has changed his/her occupational profile and a new employee B has come to fill this position. If we replace Employee A’s particulars in the directories with those of Employee B, no Employee A’s records will remain in the database, and all previous records will show Employee B. In this case, it would be correct to create a new record for B, and make A’s records hidden putting the checkmark in the relevant box.

Complete deletion of a record from any section of the directory can be done only if this record is not used in other sections of the system. If you attempt to delete a record used by other elements of the system, then this message will appear:



These rules apply to all sections of the directories.

3.2. Project Clients

3.2.1. General Information

After the directories have been completed, you should enter information about clients into the database.

In further work, in order to be able to add a client to the electronic register in the section “Daily recording”, its ID code and basic data should be first entered into the “Client cards”.

For the successful use of SyrEx2 a well-defined system of records management and client encoding (1 person = 1 code!) should be established within the organization.

Attention! When a report for new clients is being generated, clients are considered new if there is a new record for them in the reporting period in the section “Daily recording” (i.e. a first visit).

Attention! If your project activities had begun before you started using SyrEx2, then the system will begin to accurately process new clients at least six months after you started to use it actively (started filling in the section “Daily recording” on a regular basis). To avoid this you may create a first visit daily recording sheet where all current clients of the organization will receive one specially created for this purpose service, for example General counseling.

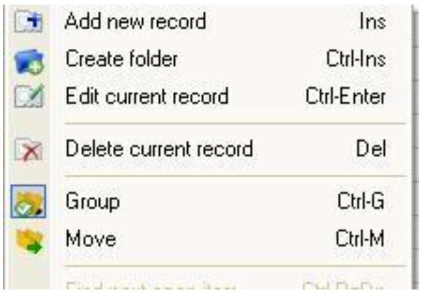
In order to access the section *Clients*, you can select the menu option *Registers → Project Clients* or use the relevant button on the toolbar.

Dealing with the records, you can use the same procedures as with the directories – you can select a procedure that suits you best from the following choices:

- Using the keyboard

  - Ins – to insert a record
  - Del – to delete a record
  - Ctrl + Enter – to edit a record

- Using the shortcut menu that pops up after clicking the right-hand button



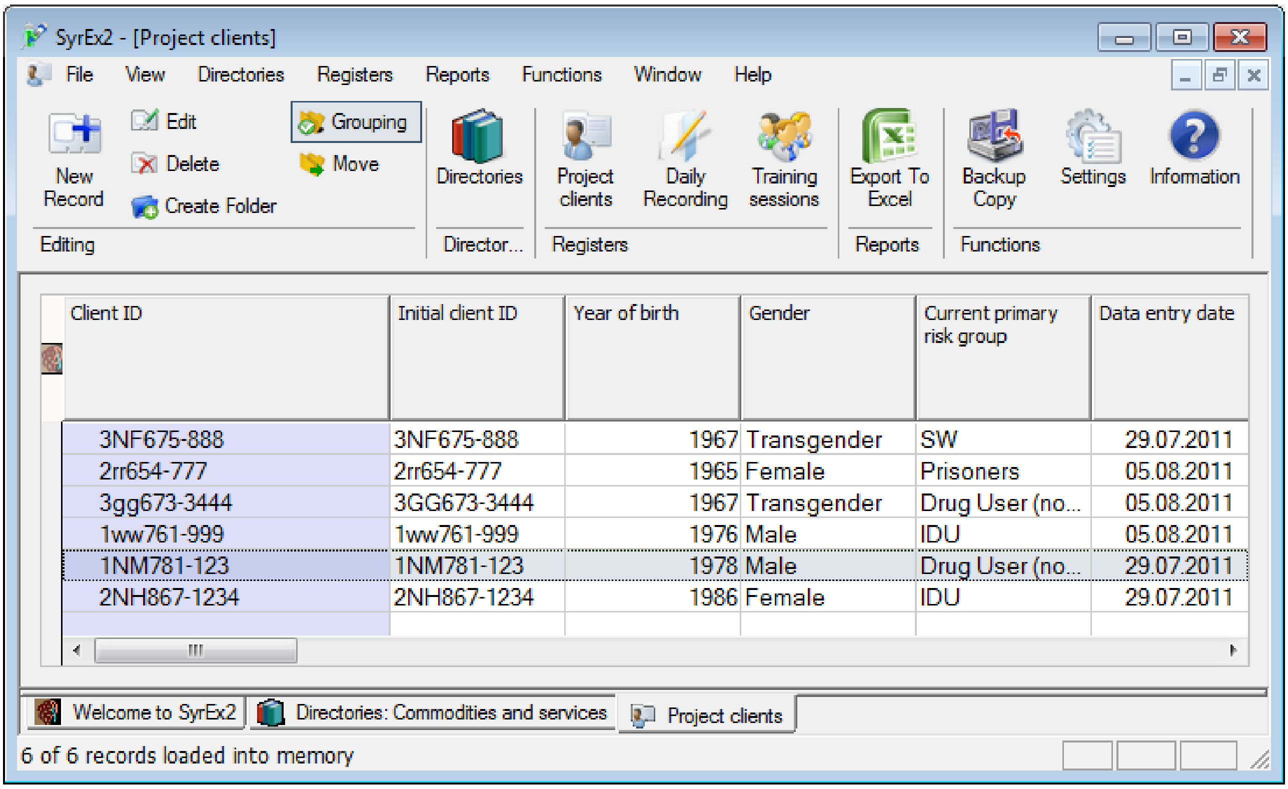
- Using the mouse

  - A double click opens a record for editing
  - A double click against a white background creates a new record
  - A double click on the tab at the bottom of the screen closes the active window.

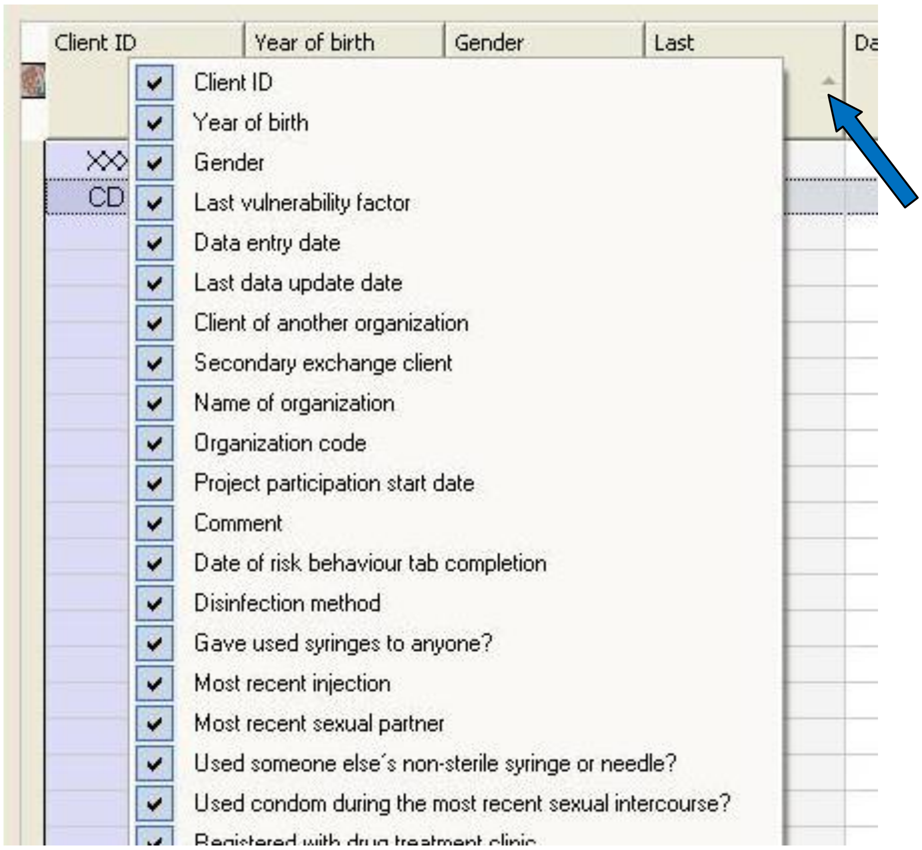
If the contents of a record have been changed, then the name of the relevant window will contain * (asterisk).

- Using the toolbar

The client list is displayed as a table (list):

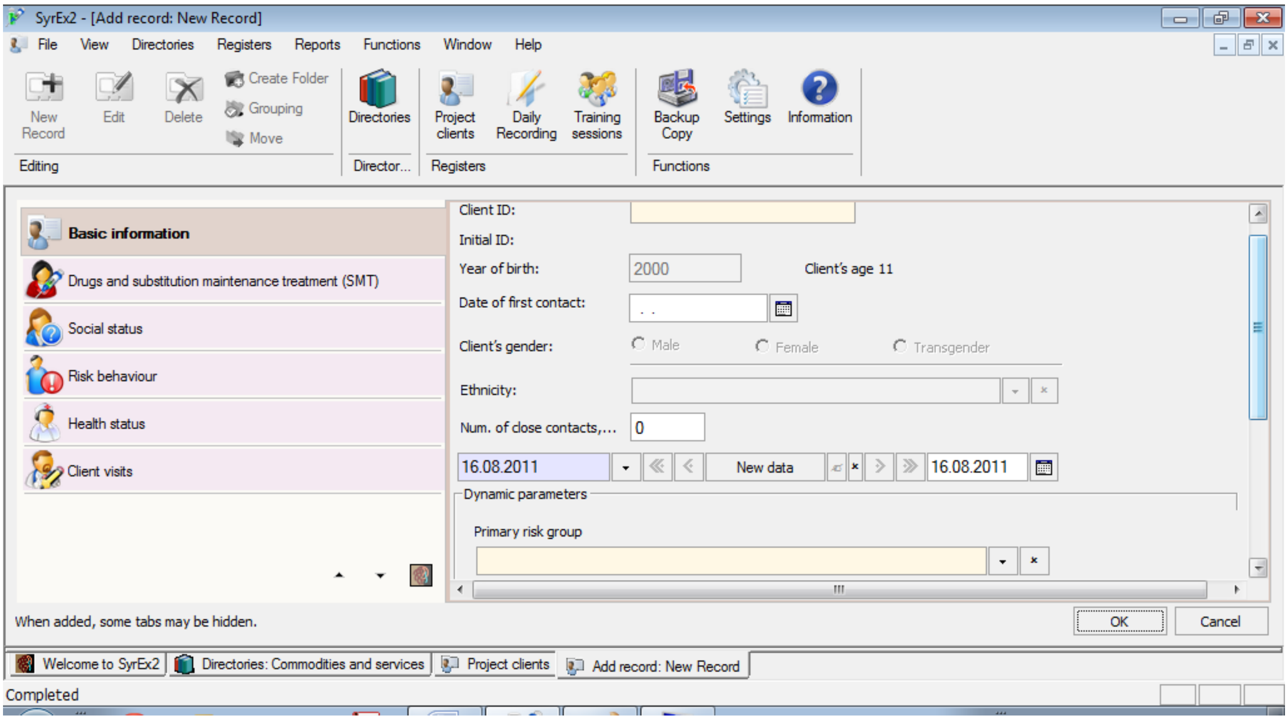


The user can set up the list of fields displayed through the shortcut menu (clicking the right-hand mouse button on the list of fields displayed):



Clients in the current folder can be sorted by any field in ascending or descending order. For this purpose, all you have to do is click on the column title. A second click reverses the order of sorting (sorted column is marked with blue arrow). The order of fields can also be changed. For this, all you have to do is drag the column title to the desired position. The program will automatically memorize the new order of fields.

The screen of adding a new client looks as follows:



3.2.2. Dynamic and Static Parameters of Client Cards

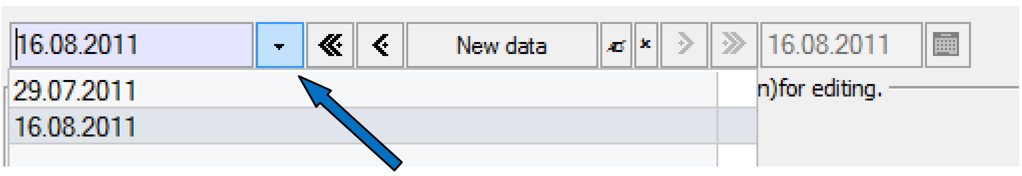
In all the blocks of the client card all fields (parameters) are divided into static and dynamic ones.

Static fields may have only one value throughout the entire time, and cannot change with time. When the value of a static field is changed, the details of its old value are not preserved. For example, if we change a value in the static field "Tested for" in Health status, then the system will not retain the earlier information assigned to this client in this field.

For dynamic fields the history of parameter changes can be preserved. For example, you can add a new value for the dynamic parameter "Primary risk group" with indication of the date. In this case, the system will keep a record that at one time the client belonged to the vulnerable group "IDU", and as of the specified time the vulnerable group became "Prisoner". In the reports the information will be retrieved on the last date of the report period.

All dynamic fields share the common operating principle:

The left-hand field with the date against a blue background shows the date of entry of the record being displayed at the moment. If the down arrow is pressed, the entire list of dates when the records were added will be shown. With the help of this list you can immediately move to the desired record.



The buttons below are intended to be used for the following actions respectively (left to right):

- To go to the first record
- To go to the previous record
- To add a new dynamic record for a new date
- To correct. Use this function to edit a record ONLY if you have detected an error in a record. If you need to update information when more recent data for a new date have become available, use the "New Data" button.
- To delete the current record
- To go to the next record
- To go to the most recent record

When creating a new record you must select a date in the right-most field starting from which the changed data become valid. The default setting is the current date. You can select any other date – earlier or later.

A pop-up help message will appear after pointing the mouse to any of these buttons.

3.2.3. <u>Filling in the blocks of client cards</u>

The client card includes six blocks:

➢ Basic Information

- Client ID– a code in accordance with your organization's encoding system.

  Client ID should be constructed as follows: **GNMYBE-card serial number** (without spaces) where:
  G - 1 digit – client gender (1=M/2=F/3=T)
  N – first letter of client name
  M – first letter of client's mother's name
  YB – two digits – two last digits of client's year of birth
  E – 1 digit – ethnicity (1=Malay; 2=Chinese; 3=Indian; 4=Sarawakian; 5=Sabahan; 6=Other; 7=Unknown)
  Enter "-" and then serial number of the client's card.

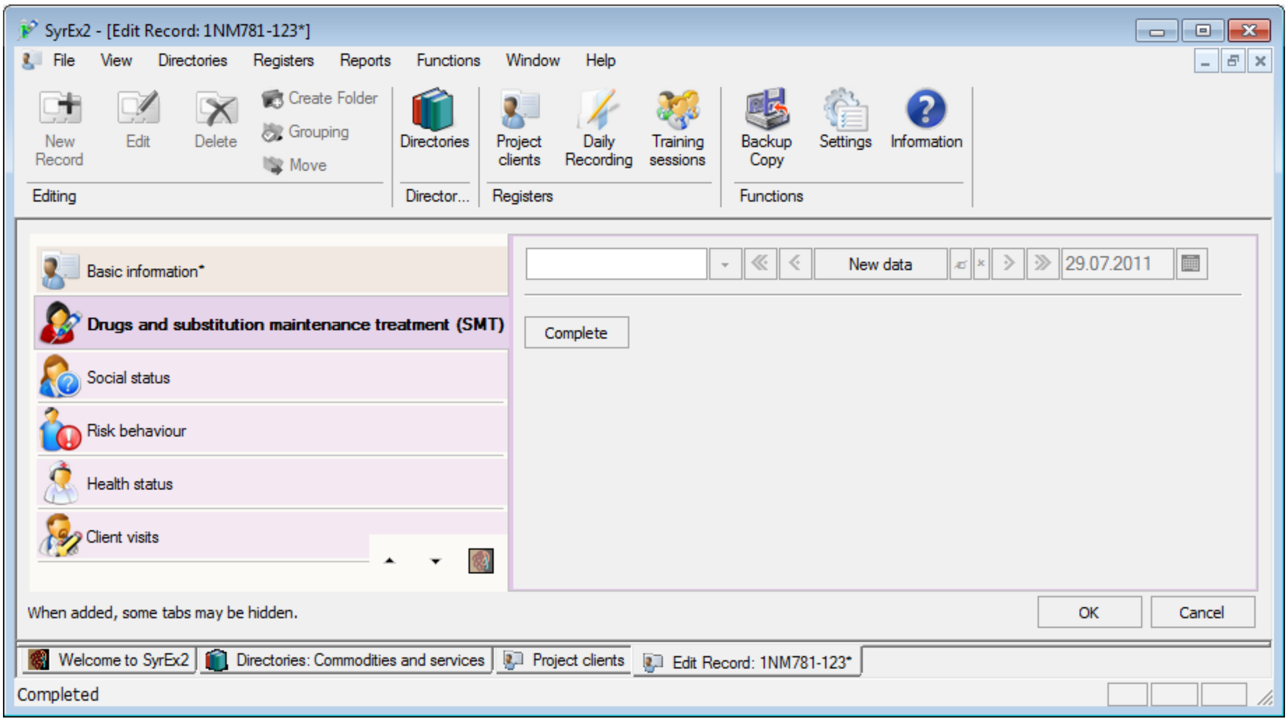
  Attention! You can only save the client record if Client ID matches the required format.

- Initial ID: filled automatically with the first client code;
- Year of birth: filled automatically according to client ID;
- Date of first contact;
- Client's Gender: filled automatically according to client ID;
- Ethnicity: filled automatically according to client ID;
- Number of close contacts: close contacts include client's immediate family, sexual partners, close friends, but can also include social workers/ volunteers involved in service delivery and others who would indirectly benefit from the project-supported services. If a person in close contact belongs to a key risk group (i.e. IDU), (s)he has to be added as a client and shouldn't be counted in this field.
- Primary risk group. You can choose only one group. Dynamic parameter.
- Additional risk factors. You may choose several factors.

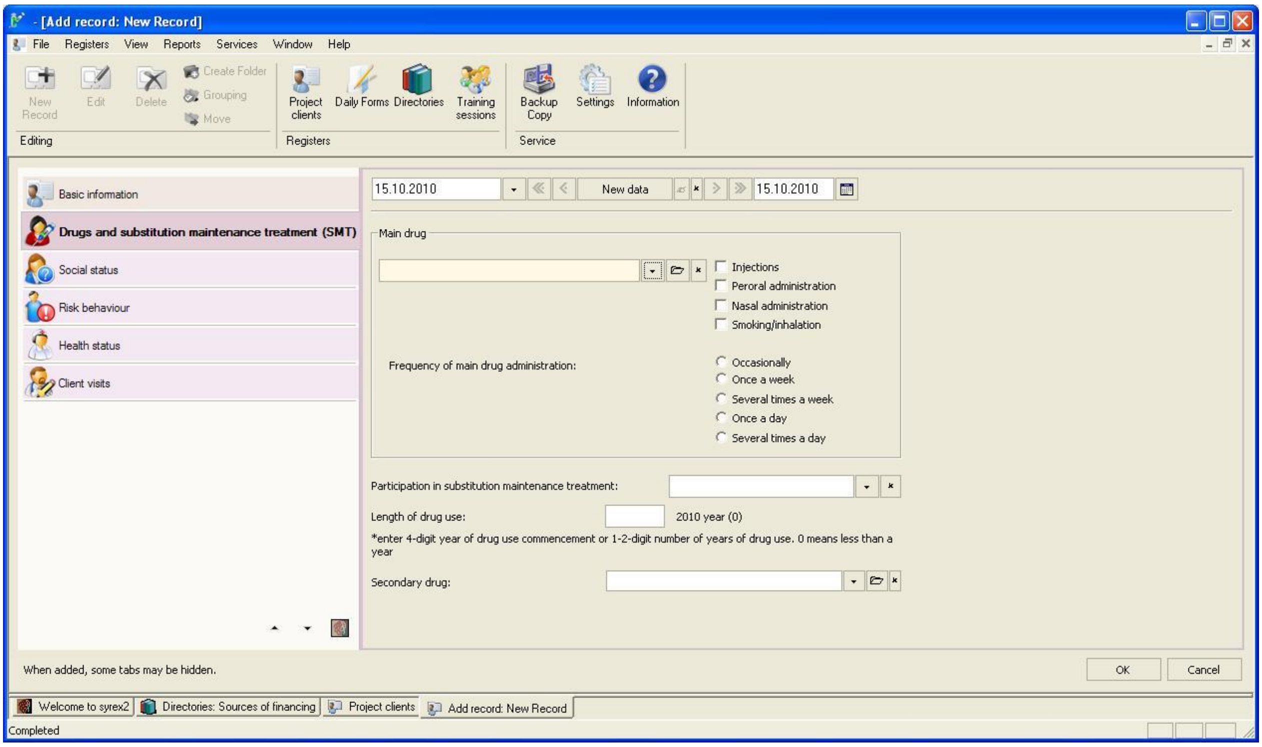
- Comment: different comments in any format.

➢ Drugs and SMT (Substitution Maintenance Treatment)

The fields on this tab are required for clients who are both injecting drug users and non-injecting drug users (smoking, inhalation, etc.). Click “Complete” to complete this section.



The following window will pop up:



In this case, the required block is “Main Drug”. To complete this block, you can select one of the narcotic drugs from the directory[1].

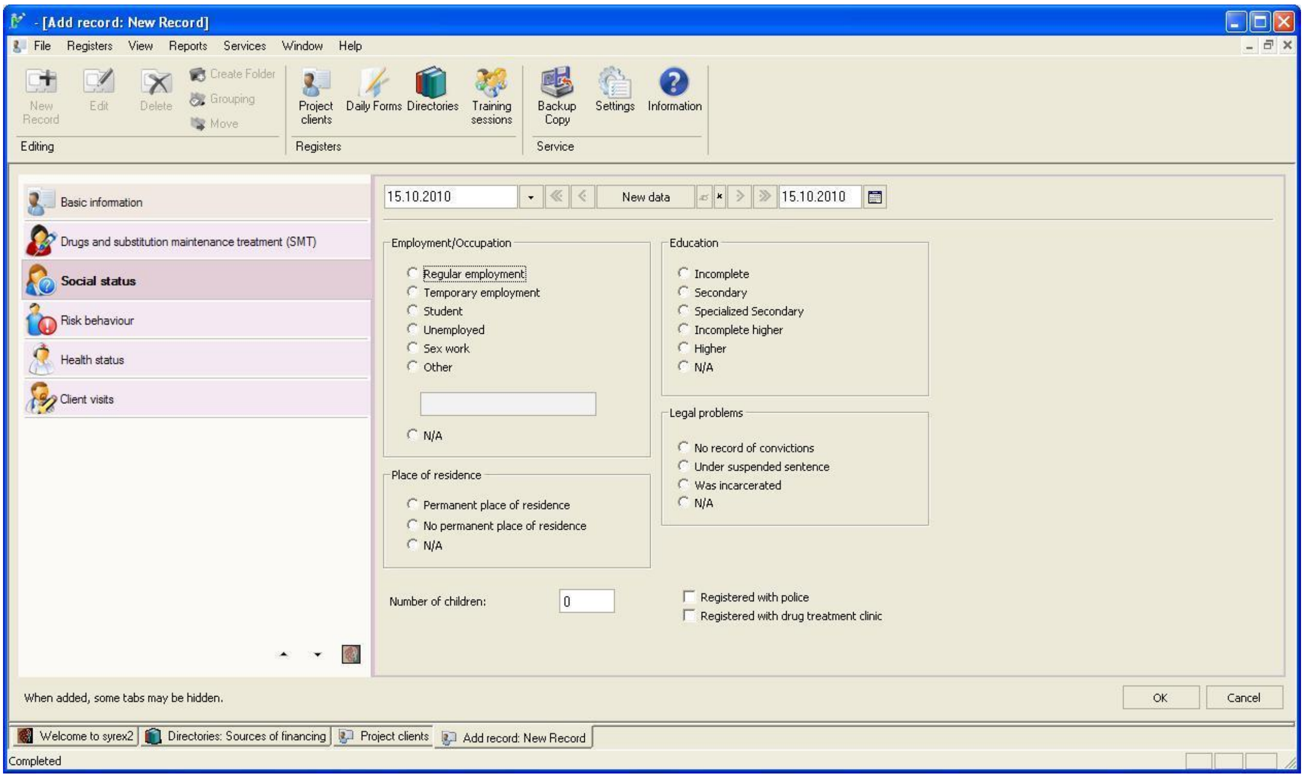
Also, you can complete the fields:

- Participation in Substitution Maintenance Treatment;
- Duration of drug use;
- Secondary drug.

All the fields of this section are dynamic. See above for procedures with dynamic fields.

➢ Social Status

Fields on this tab are optionally but not compulsorily required. If you wish to complete this section, please click “Complete”. This window will show up:

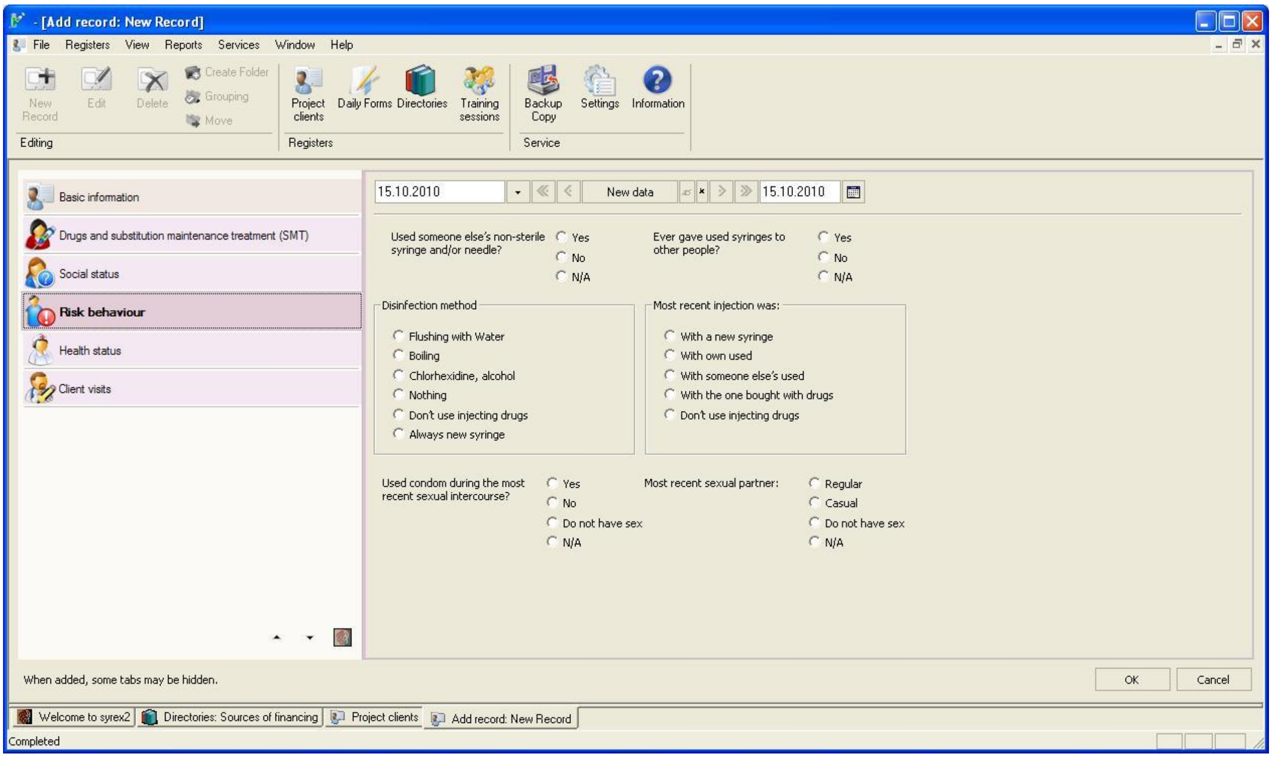


Please complete the fields, if possible. All the fields of this section are dynamic.

- Risk Behavior

If you wish to complete this section please click “Complete”. This window will show up:

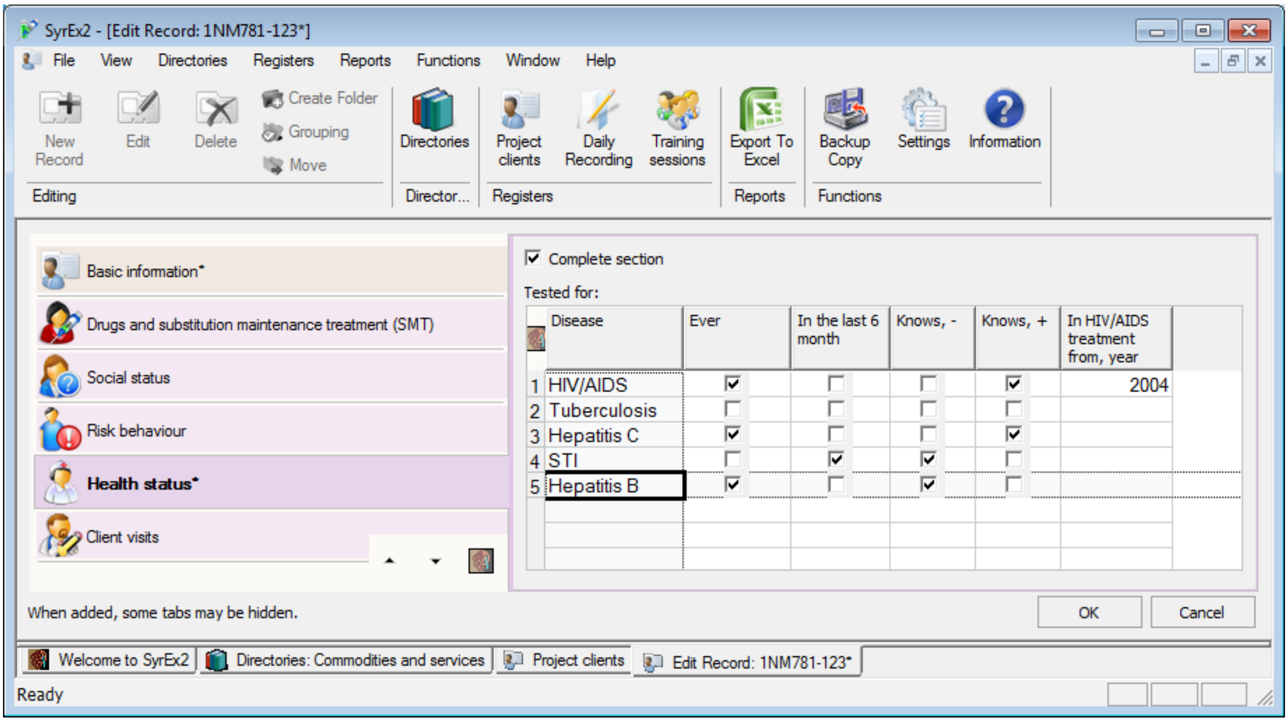
[1] See para. 3.1.4. “Narcotic substances” on how to change or add data to the Directories.



Please complete the fields, if possible. All the fields of this section are dynamic.

- Health Status

If you wish to complete this section, please put a checkmark in the "Complete Section" box. This window will show up:



For the recording of testing, diagnostic and treatment information four individual diseases and one group of diseases (STI - Sexually Transmitted Infections) have been entered into SyrEx2.

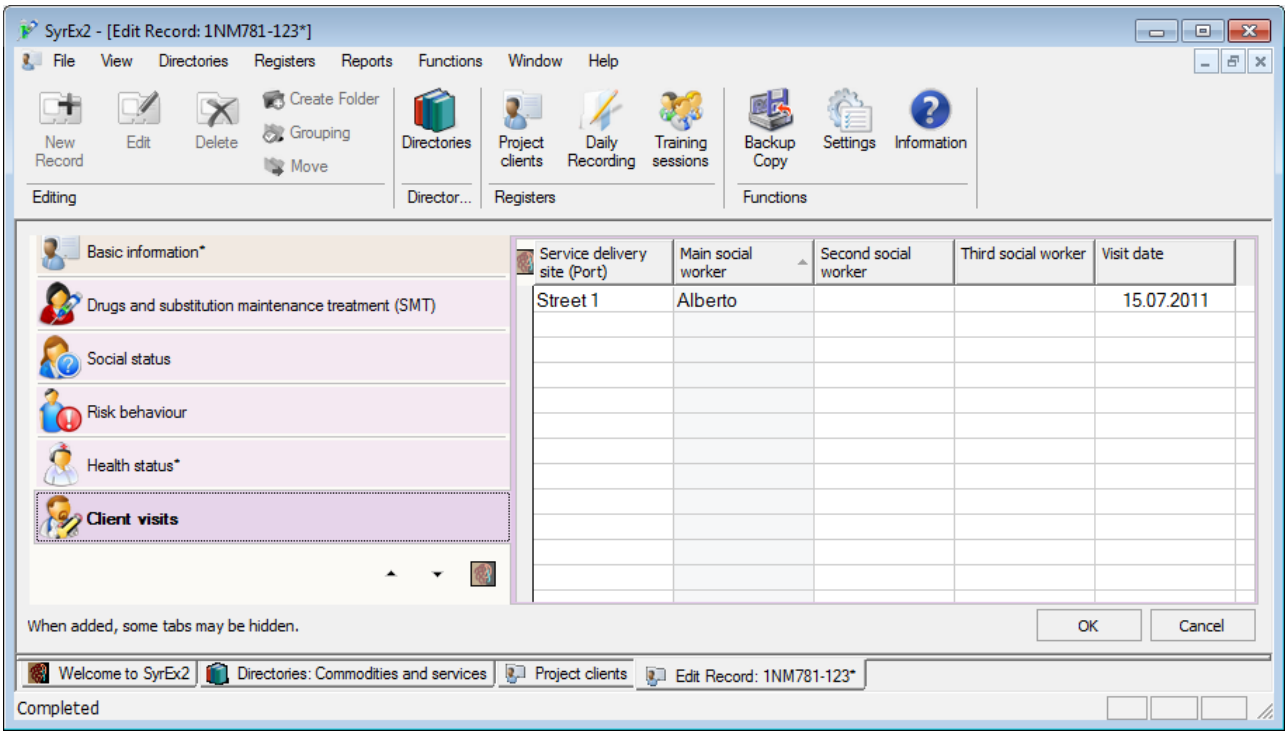
Attention! You can't add to the list of diseases, but you can record information corresponding to the specified columns, relating to the five diseases shown.

There are the following fields:

- *Ever*. Has the client ever been tested for this disease or group of diseases?
- *In the last 6 months*. Tested in the past half-year?
- *Knows (-)*.Tested negative.
- *Knows (+)*.Tested positive.
- *In HIV/AIDS treatment from, year*. Can be filled in only if Know (+) mark is set.

➢ Client Visits

This block contains client visit information (marked in the section *"Daily recording")*. This tab contains a list of dates, service delivery sites and social workers, corresponding to this client's visits. This tab **is not completed manually**.



3.3.Daily recording sheets

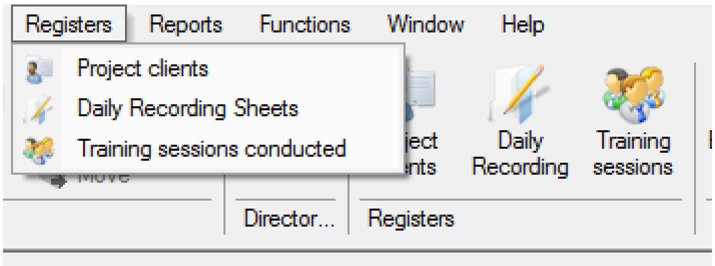
The section *Daily recording* is used for entering information about client visits as well as commodities and services provided into the database as the completed registers from service delivery sites and individual counselors/ doctors arrive.

Before proceeding to complete electronic registers, all the clients must be entered into the client database[1]. If you enter data about a new client (on a first visit), then (s)he must first be added to the client list, and only after this you may proceed to complete the electronic register in accordance with daily records management requirements.

[1] See para. 3.2. Project clients

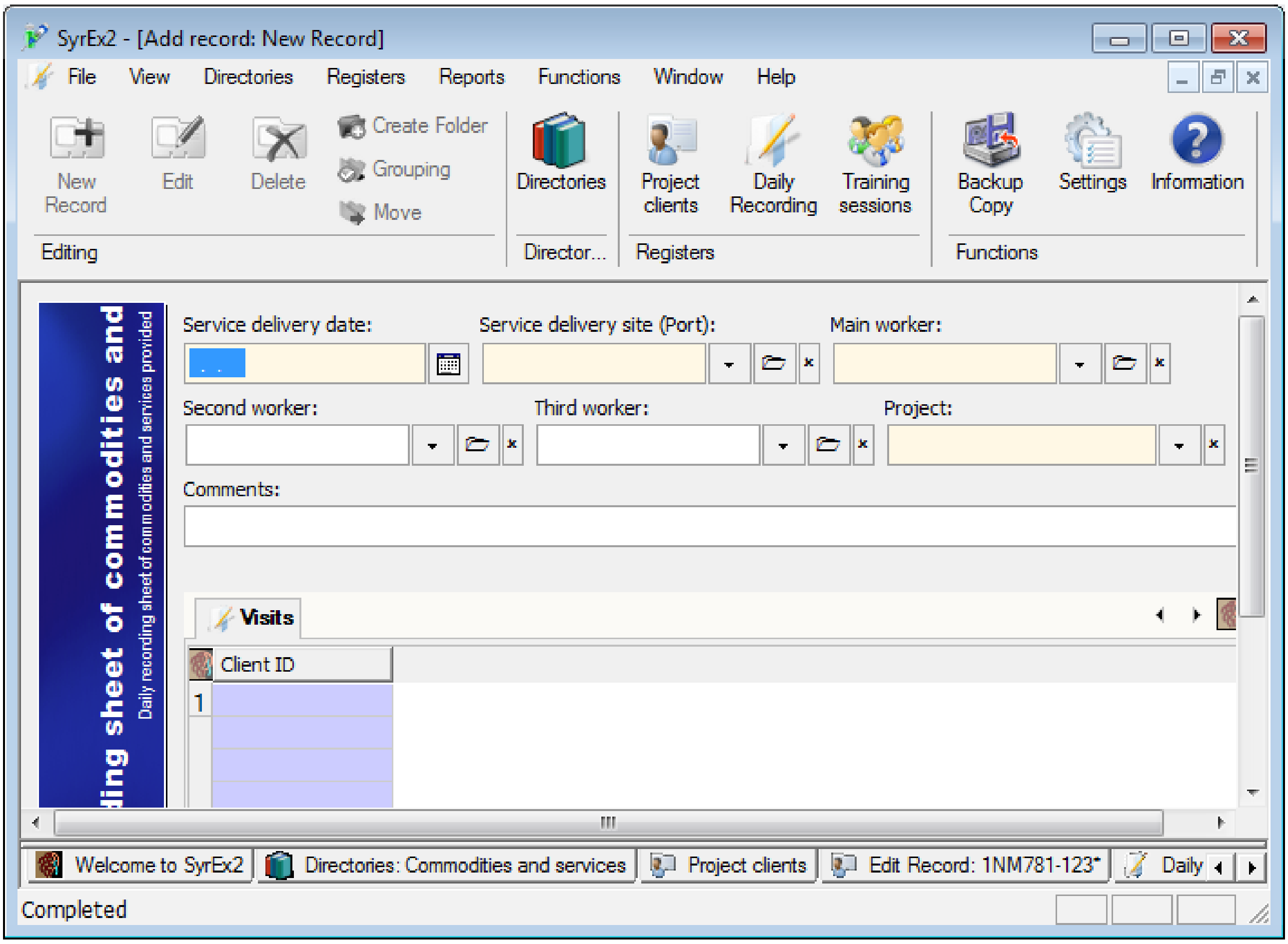
3.3.1. Daily recording directly in SyrEx.

In order to access the section *Daily recording sheets*, you can go to the menu option *Registers* → *Daily recording sheets*, or use the button *Daily recording* on the toolbar.



All interface procedures described in para. 3.2. *Project clients* can be applied to this mode of operation. As with all the lists, the set of columns displayed can be customized, clicking the right-hand mouse button on the name of one of the columns.

When a new (empty) register is created, this window will appear:



Client ID is a required column and displayed by default.

Complete the required fields:

- Service delivery date;
- Service delivery site (Port);
- Main worker (Social worker, Specialist or Doctor).

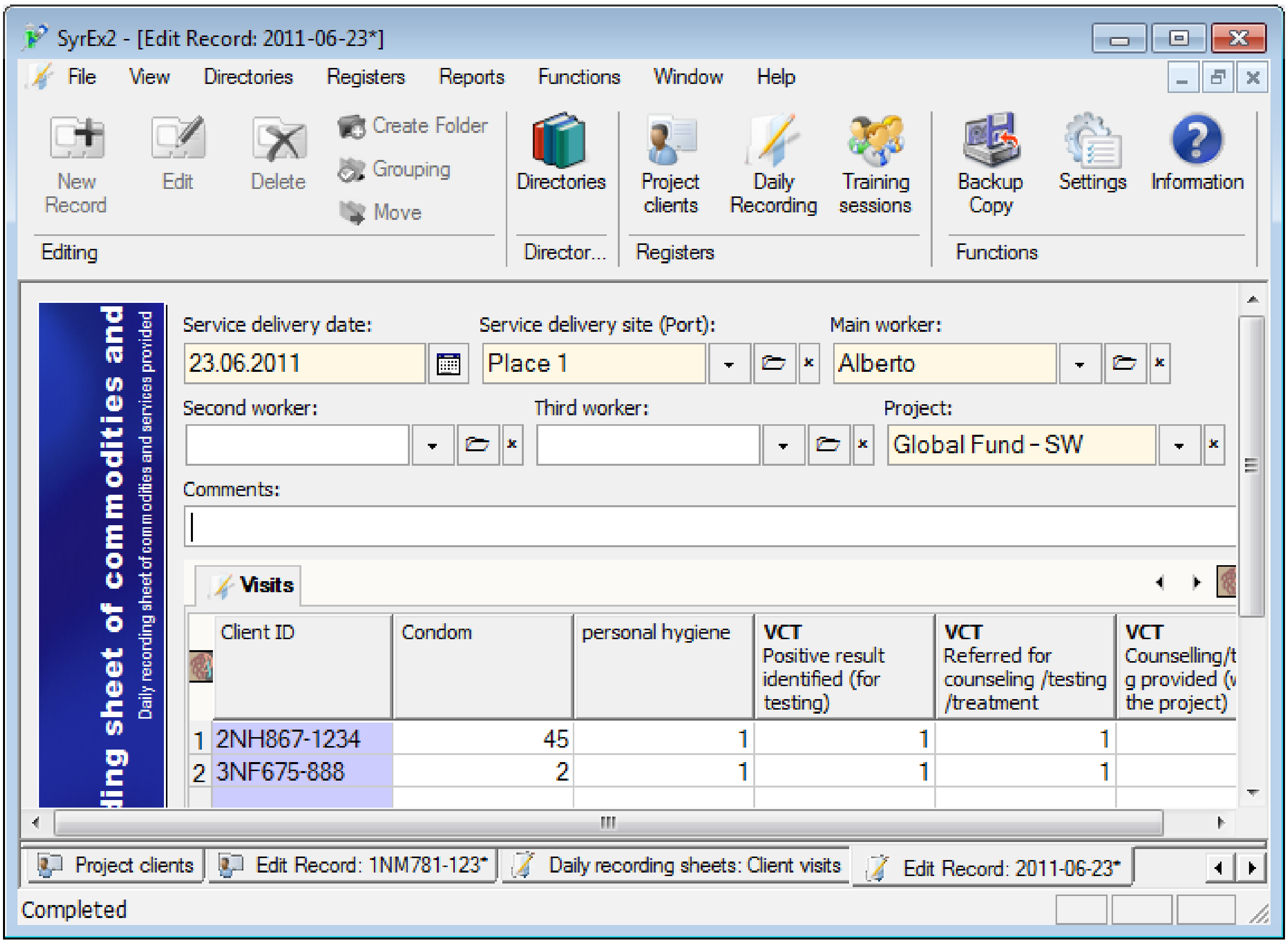
You can specify a Second or Third worker and add any Comment, if necessary. In the field “Second\ Third worker” you can also indicate a nurse who helps the doctor with testing, or a volunteer who works together with the social worker.

- Project: you can choose from one of the six projects. You can’t add additional one.

Daily recording includes two types of sheets:

1) **“Visits”** – client ID-based register. Here you specify commodities and services provided, recorded <u>by ID</u> (i.e. for each commodity or service provided you must indicate the ID of the client who received them).

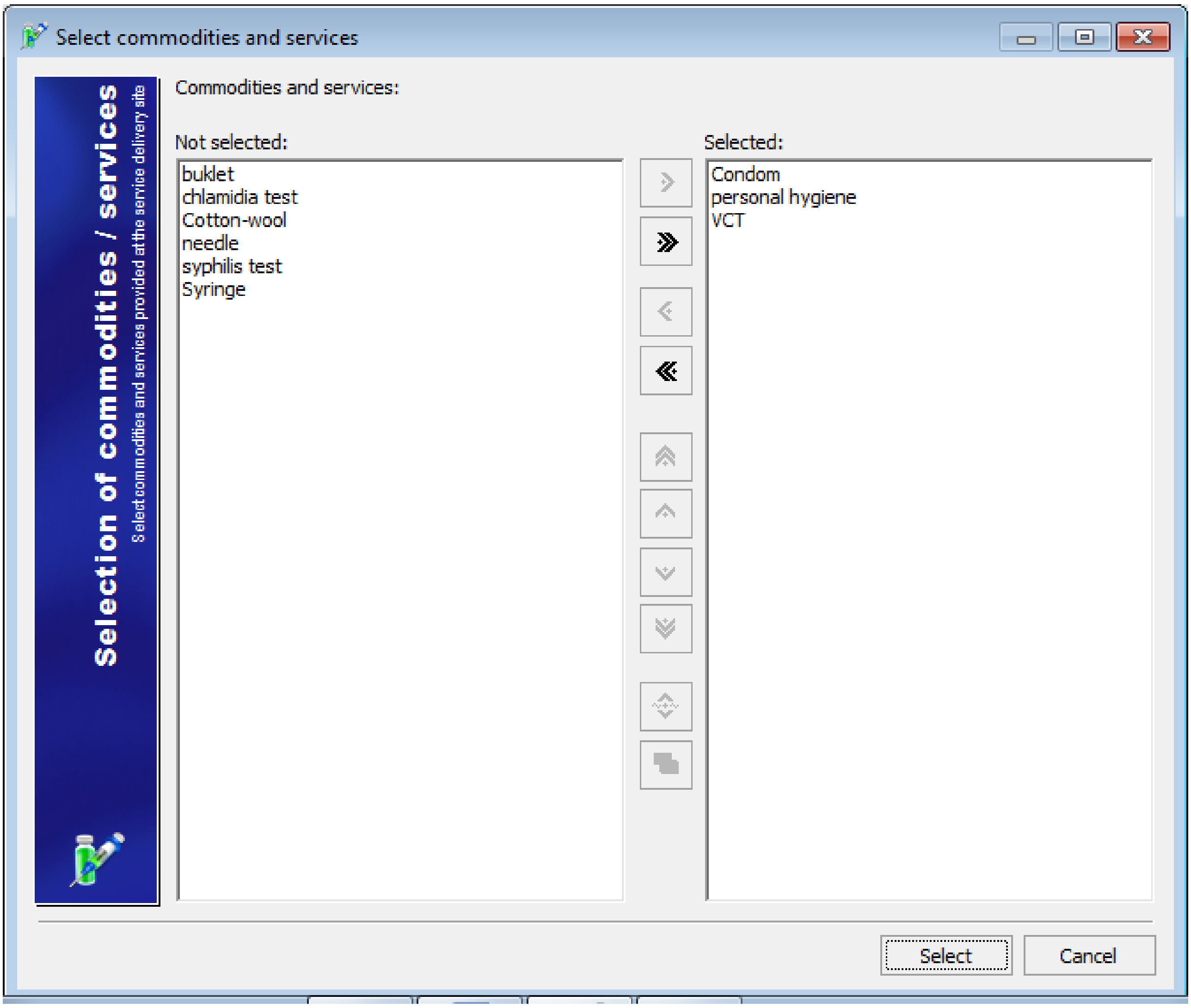
The *Counseling* services marked in the directory “registration against client ID code” will be displayed in this type of register.



You can use the following two options to add commodities and services to the register:

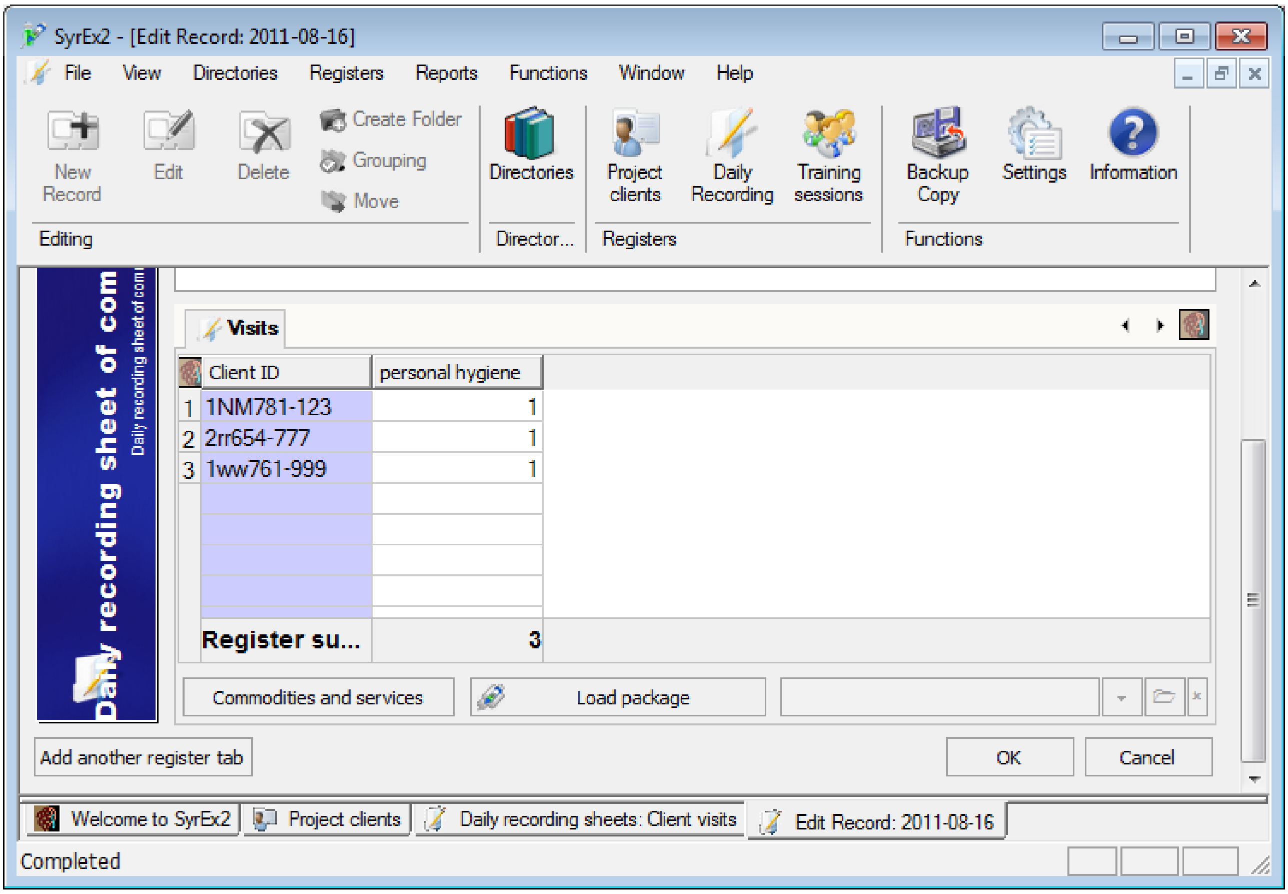
- <u>The “Commodities and services” button</u> allows you to select a list of commodities displayed one by one;
- <u>The “Load package” button</u> allows you to add at once one package of services previously specified in the Directory “Package of Services”[1]. If this option is chosen, you can add or delete commodities and services from the existing package one by one.

[1] See para. 3.1.5. Package of services.



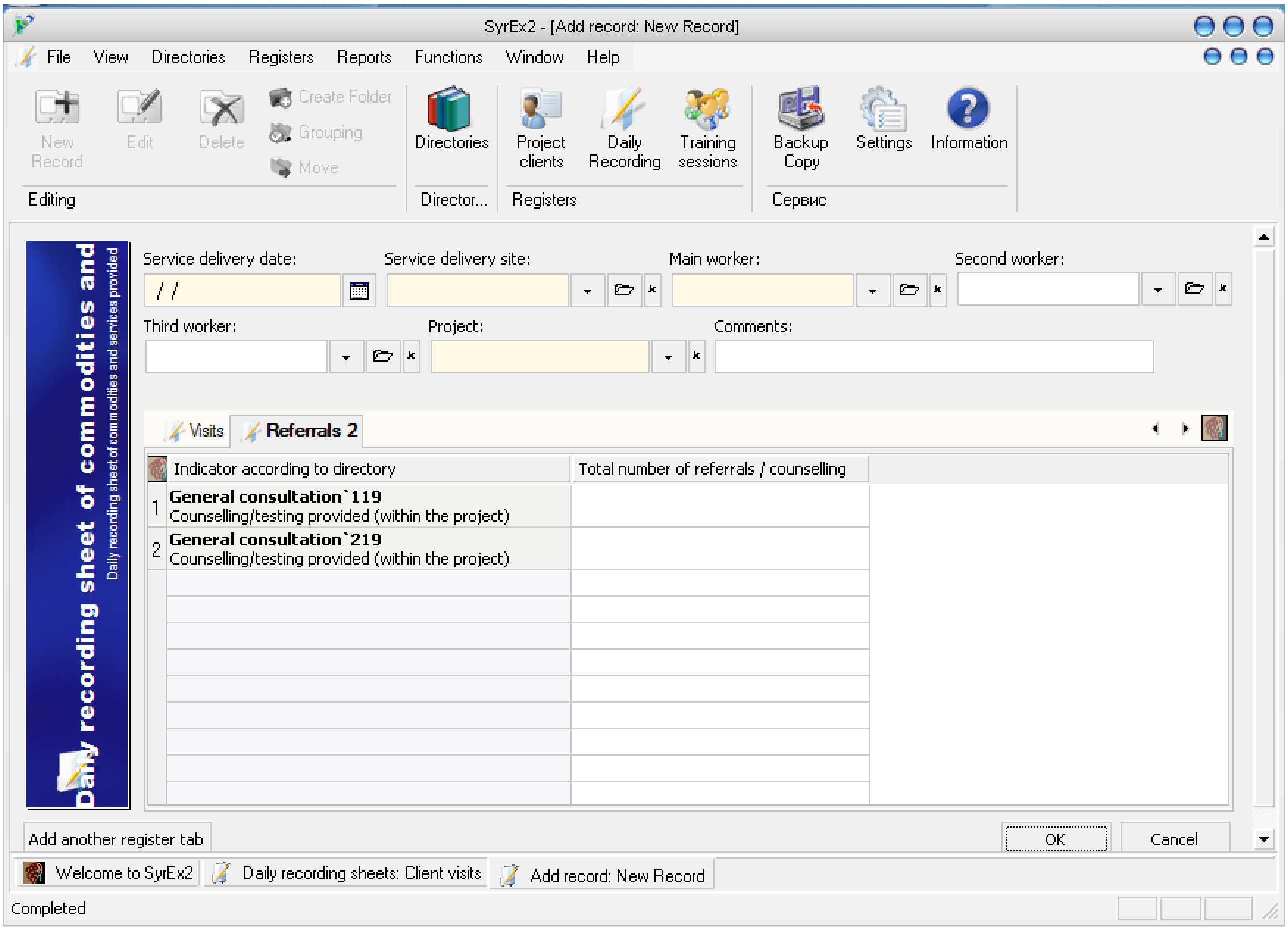
- <u>“Everybody-one” instrument.</u> The SyEx2 system features a capability to define a client list, select one commodity or service, and this commodity or service in the quantity of one will be automatically assigned to every client on the list. This is done as follows: the client list is entered, and then the desired commodity is selected from the list on the right-hand side of the window at the bottom.

When a register is saved and then opened, we can see the following result of this operation:

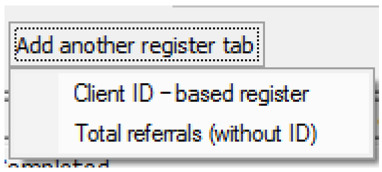


2) **“Referrals”** – total counseling and referrals without ID. Here you record referrals for counseling/ testing as well as counseling/ testing/ treatment provided by outside specialists, recorded not by ID code (i.e. for each case of referral/ counseling/ testing/ treatment you can specify only the total number of clients, using these services, but not their ID).

When adding this type of register the list is automatically filled in with those records of the Directory *Commodities and services*, where the Referrals and counseling type was marked, and where the “Registration against client ID code” box was not check-marked[1].

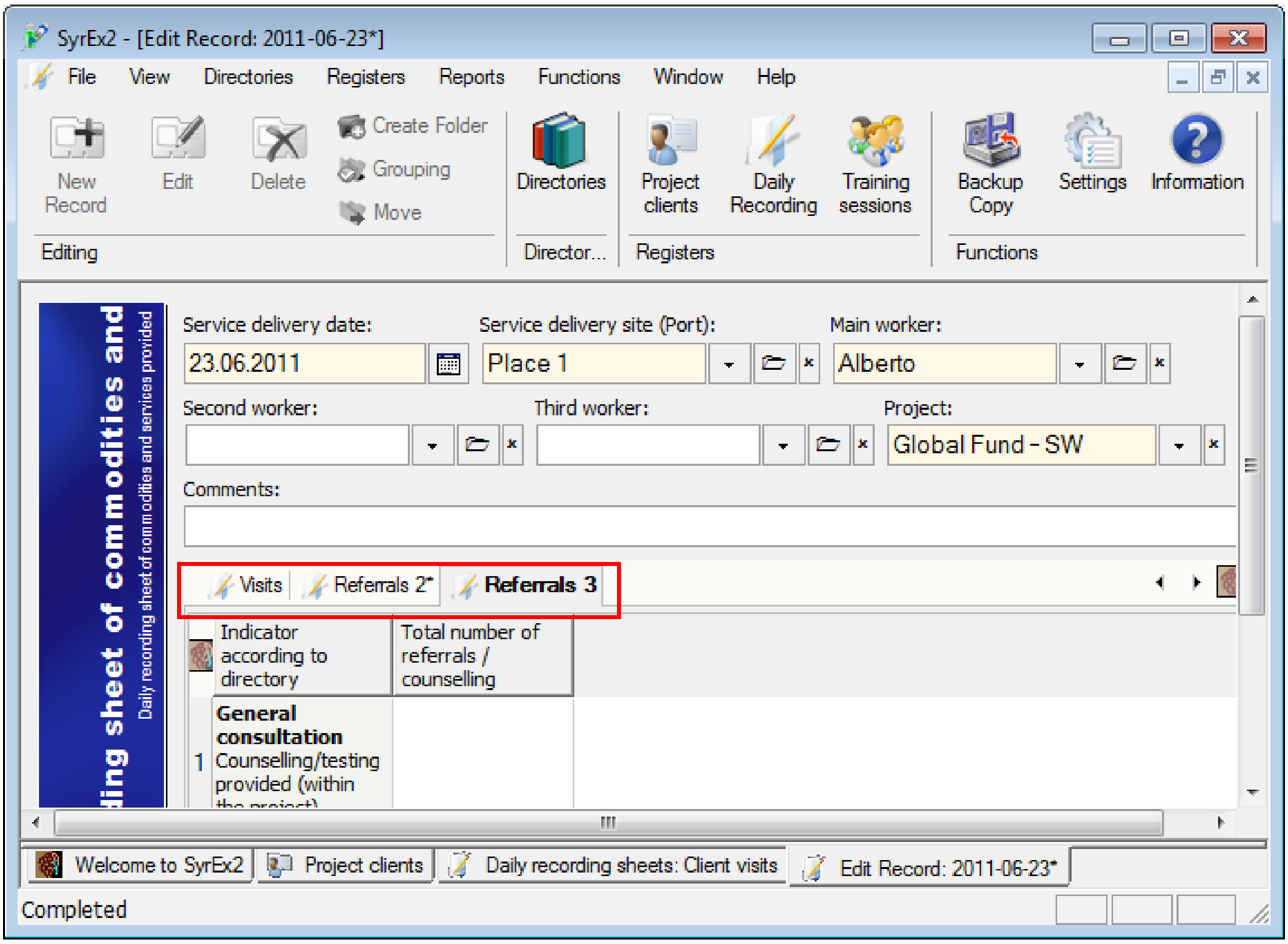


You add this type of register, clicking the “Add another register tab” button in the bottom left-hand corner of the screen.



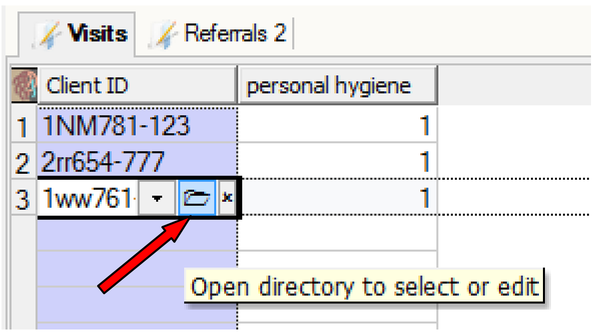
All the registers added in this manner will be displayed in the form of tabs, and will form a part of ONE record in the section “Daily Registers” (the same date, service delivery site, personnel).

[1] See para. 3.1.2. Commodities and sercices.



Every register as it becomes completed, shows the total quantity of each commodity distributed / service provided in the line Register Summary.

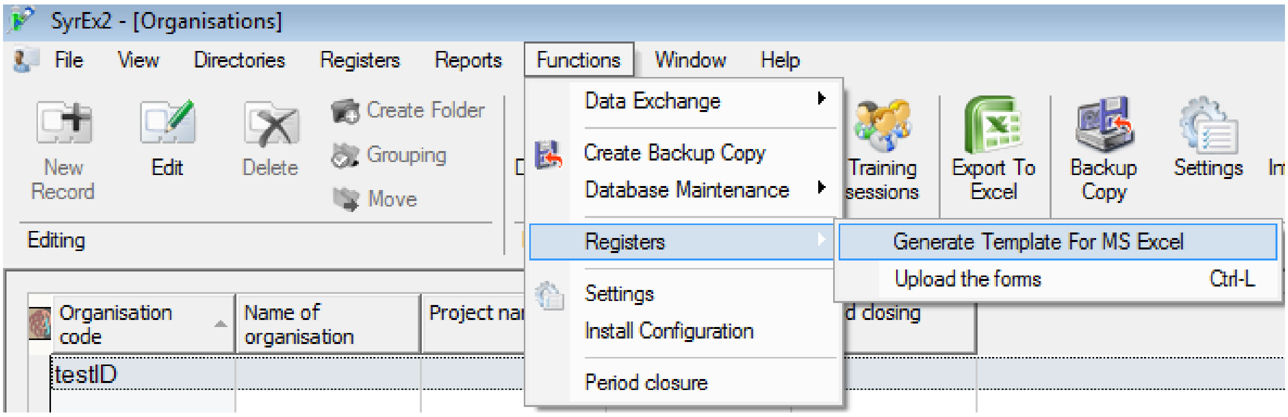
In any dropdown list you can click the  button and instantly move to the relevant section of the Directories for viewing and editing.



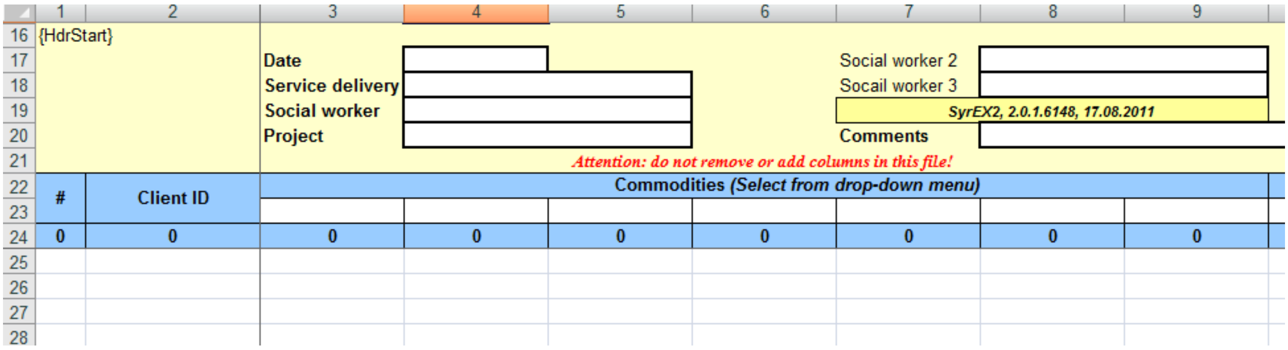
3.3.2. Daily recording by the use of MS Excel

If there is no access to the SyrEx2 database the daily records may be filled in MS Excel program with the following uploading of the saved files to SyrEx2. For this purpose the special template should be use. It includes all the directories positions that were in the database by the moment of template generation.

<u>To generate</u> the template go to Functions → Registers → Generate template for MS Excel.

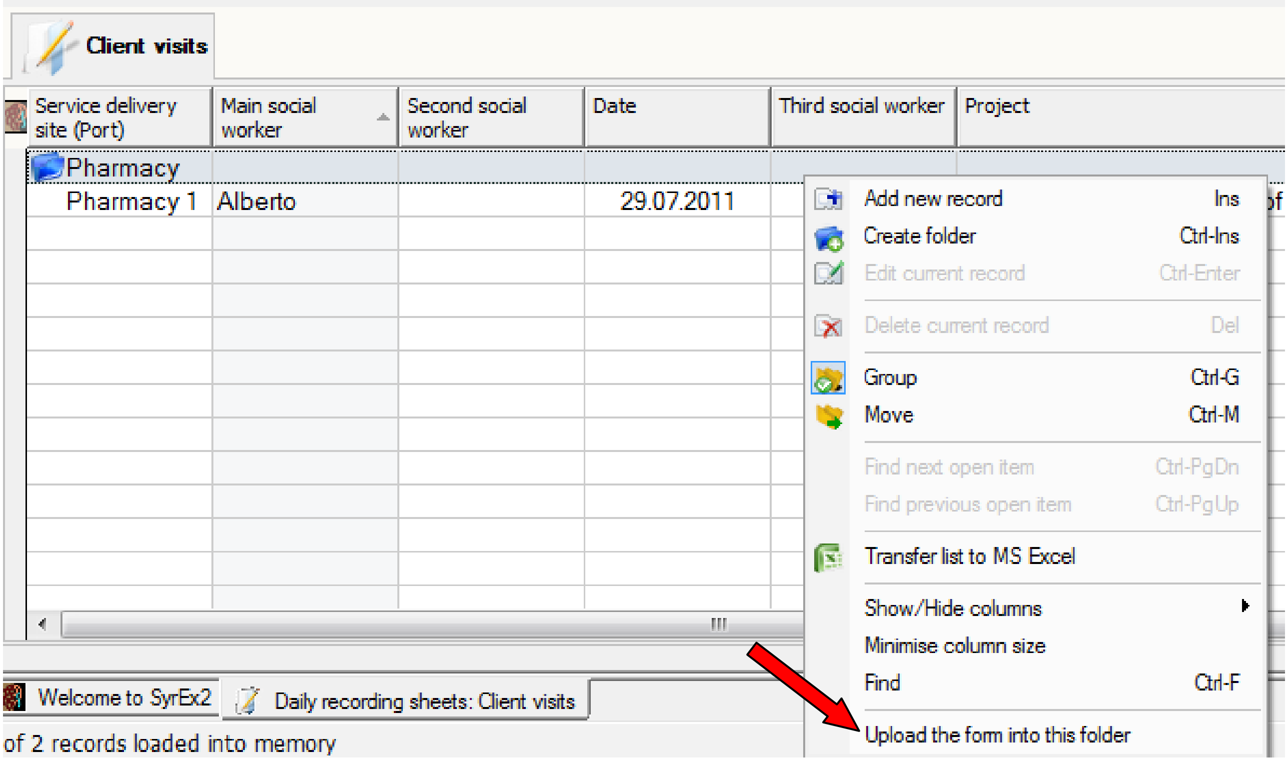


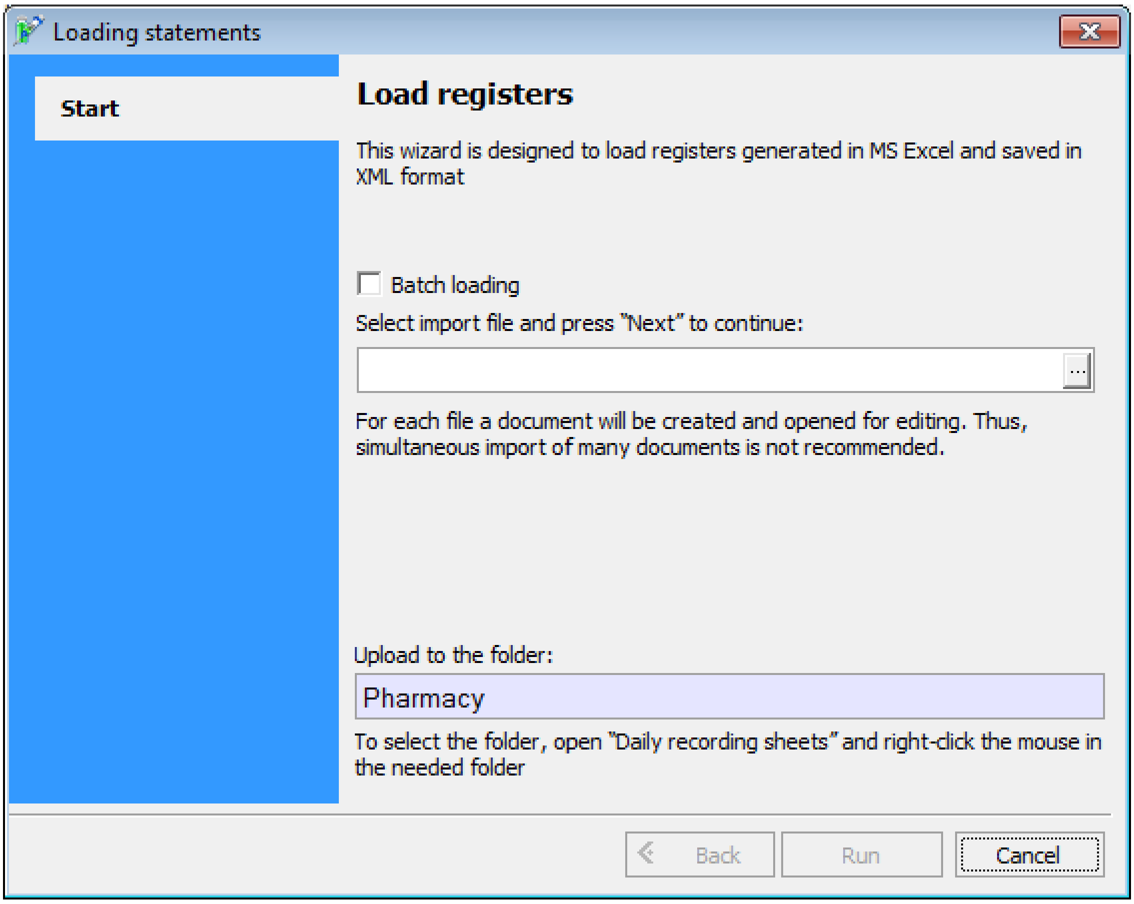
After this the folder with template saved will be opened. The file name is Report2([system code]). To upload the filled daily recording files back in SyrEx you may change only system code characters (for example, your saved file may have the name “Report2(2011_08_16_Port 1)”). Files can be saved anywhere on the computer.



<u>To fill</u> in the templates choose the date, place, worker, materials and counseling (only counseling against client ID code may be entered!) from the drop-down list. Then fill in manually the list of client ID codes and their materials and services received.

<u>To upload files</u> in the program use Upload the forms menu. If you want to upload the files in the current folder in SyrEx, open that folder and click on the right mouse button inside, choose *Upload the form into this folder* menu.





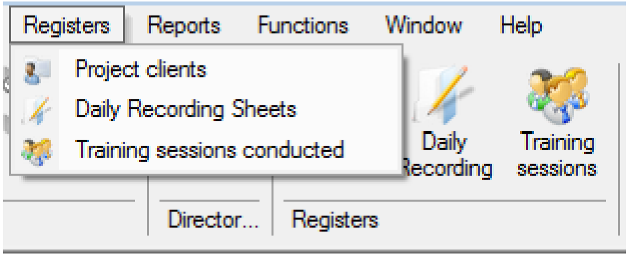
When choosing the “Batch Loading” option, it is necessary to select not a single file, but a folder with files in the address line. In this case, all the update files, contained in this folder, will be processed.

After you select the file(s) click Run. The Daily forms will be uploaded but you'll need to confirm each of them. If the new client is in the form the program won't allow you to save it before you fill in the Project client card.

3.4. Training sessions conducted

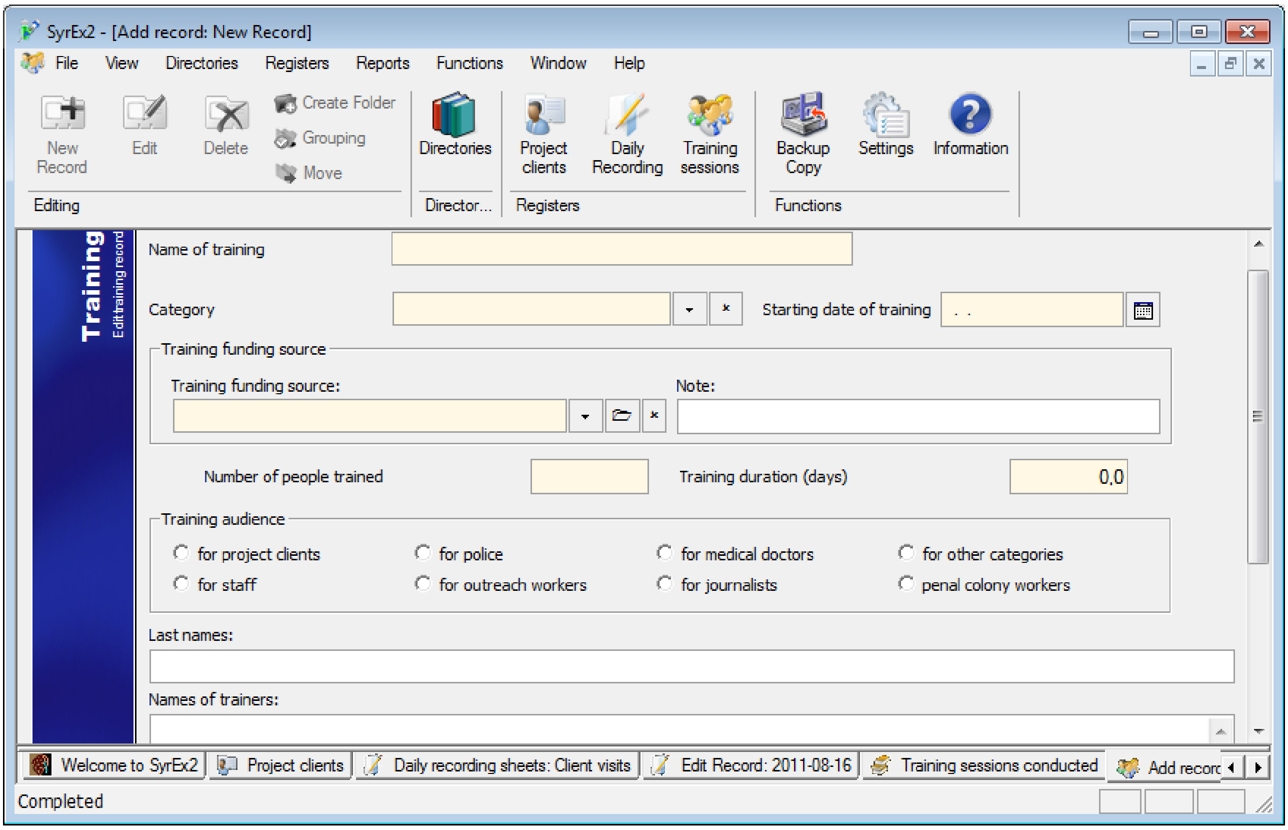
SyrEx2 allows you to keep track of training sessions held and people trained (project clients, project staff and other audiences).

In order to access the section *Training sessions conducted* you can go to the menu option *Registers → Training sessions conducted*, or click the "Training Sessions" button on the toolbar.



All interface procedures described in para. 3.2. *Project clients* can be applied to this mode of operation. As with all the lists, the set of columns displayed can be customized, clicking the right-hand mouse button on the name of one of the columns.

When a new record is added to this section, this window will appear:



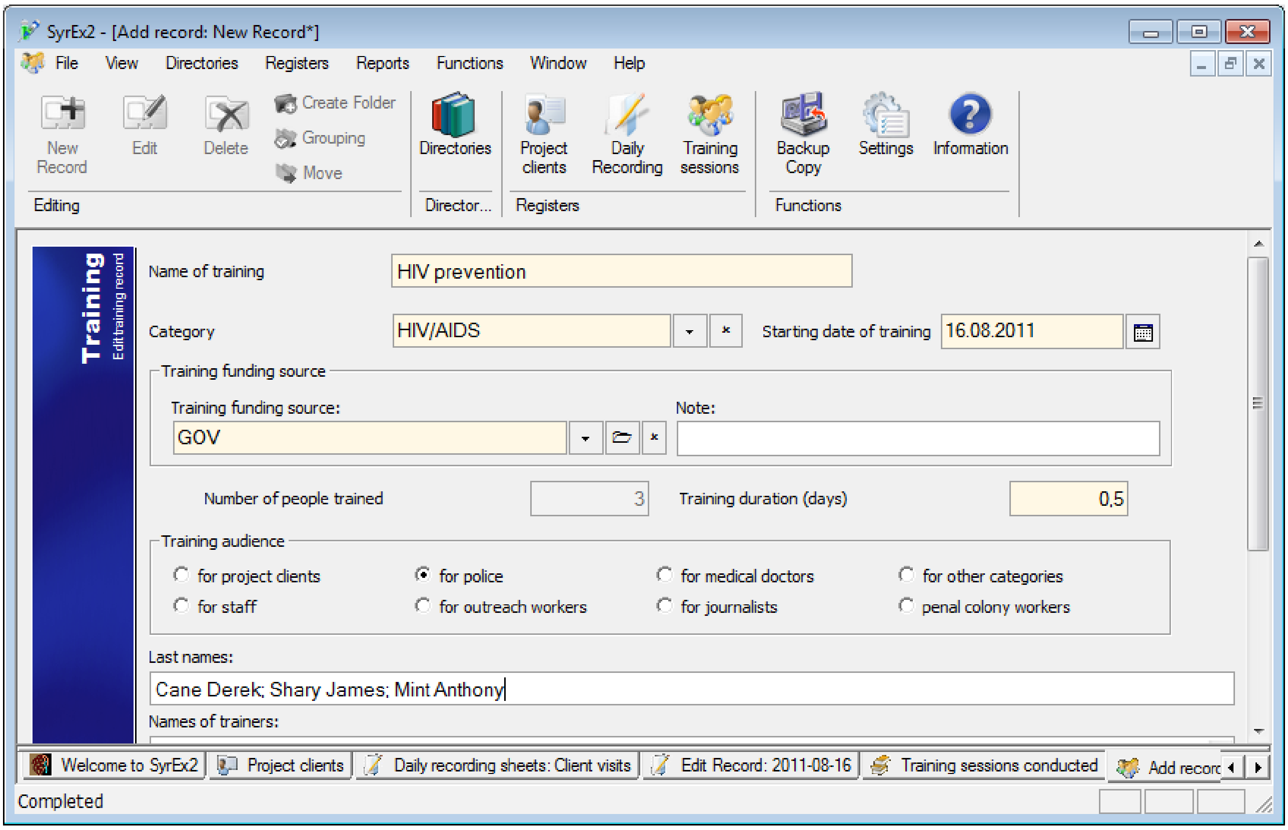
Training funding source is taken from the Funding source directory. The training duration in days may be entered to within 0,5 days.

The number of people trained may be entered in two ways:

- Without giving details of trainees' family names and IDs. In this case, the total number of people trained should be entered in the field *Number of people trained*. But if one person has participated in several training sessions, then (s)he will be recorded in the training report several times.
- with providing the IDs or family names of training audience. In this case fill in the field *Last names/ Client IDs* under the *Training audience* box. Before you list down the trained clients' IDs or the project staff names make sure that all of them have their Project client card or included in the Project staff directory respectively. After entering the trainees' names the total number of people trained will automatically appear in the field *Number of people trained*. This way the participant trained on several training sessions will be counted during certain period ones.

Attention! For correct calculation of unique number of people trained organization should define the invariable way of entering the trainees' names in the field (i.e. [last name+space+first name], [last name]). All ID codes for clients and full names for other categories should be entered after a semicolon.

For example, in this case, as full names of three policemen were given, the system automatically specified the number of people trained as "3":

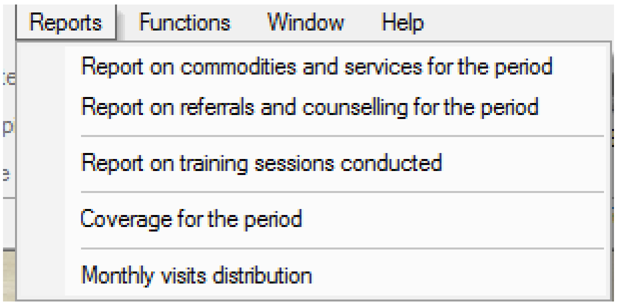


3.5.Reports

SyrEx2 provides five predefined reports:

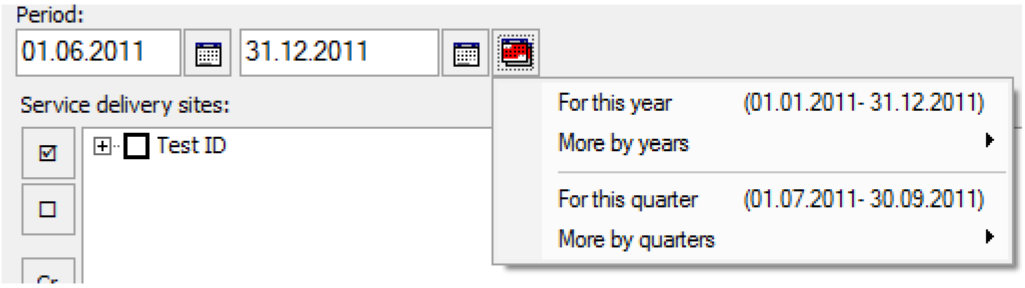
- Report on commodities and services for the period;
- Report on counseling and referrals for the period;
- Report on training sessions conducted;
- Coverage for the period;
- Monthly visits distribution.

The reports are made available through the *Reports* menu.



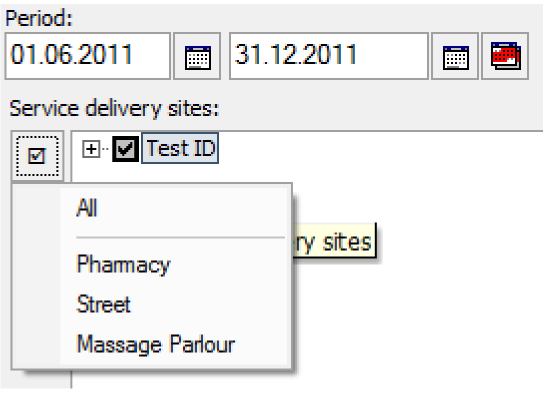
All reports, except Coverage for the period report, have an identical structure, including three blocks.

Period: select a period for which you want a report generated. You can set your own start and end dates of the reporting period, or you can use one of the predefined periods clicking the button.



Service Delivery Sites: you can select all the service delivery sites, one of them or a group. You can also mark all the sites of an organization, clicking the square located to the left of your organization's ID. Also, you can click the "+" sign, located to the left of your organization's ID, to display the entire list of service delivery sites and tick the required boxes manually.

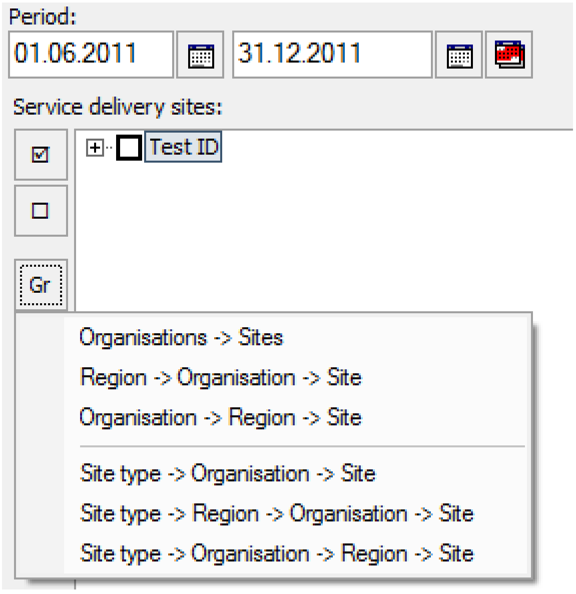
Using the button, you can mark all the service delivery sites at once or an individual group of sites.



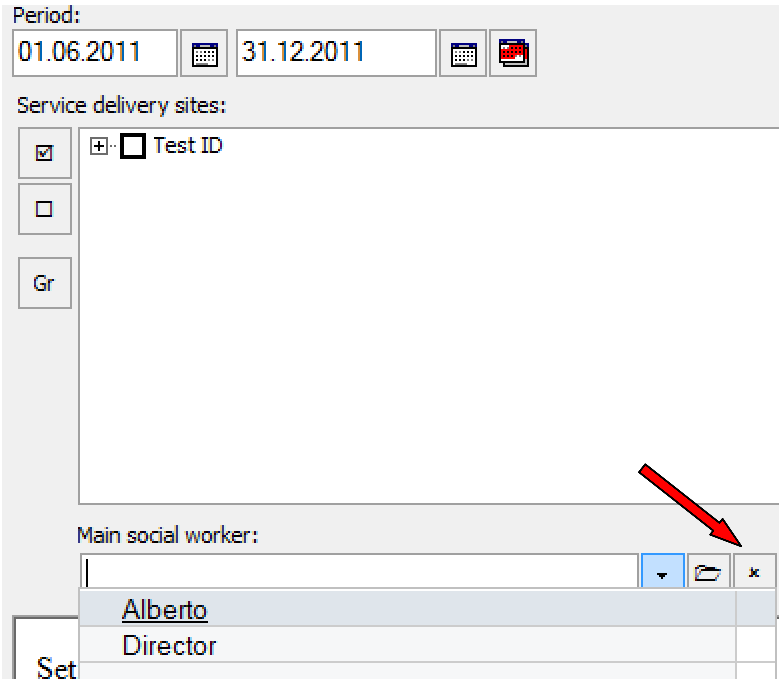
Clicking the button, you can unmark all the items at once.

Clicking the  button, you may change the grouping of the service delivery sites. There are six options:

- Organization – Sites (by default)
- Region – Organization – Site
- Organization – Region – Site
- Site type – Organization – Site
- Site type – Region - Organization – Site
- Site type – Organization – Region - Site



Main social worker: at the bottom under the block "Service Delivery Sites" you can select a single worker or specialist from the dropdown list. If you leave this field blank, the report will be generated for all social workers. If you have already entered the information in this field and want to clean it – click the button  (see red arrow).

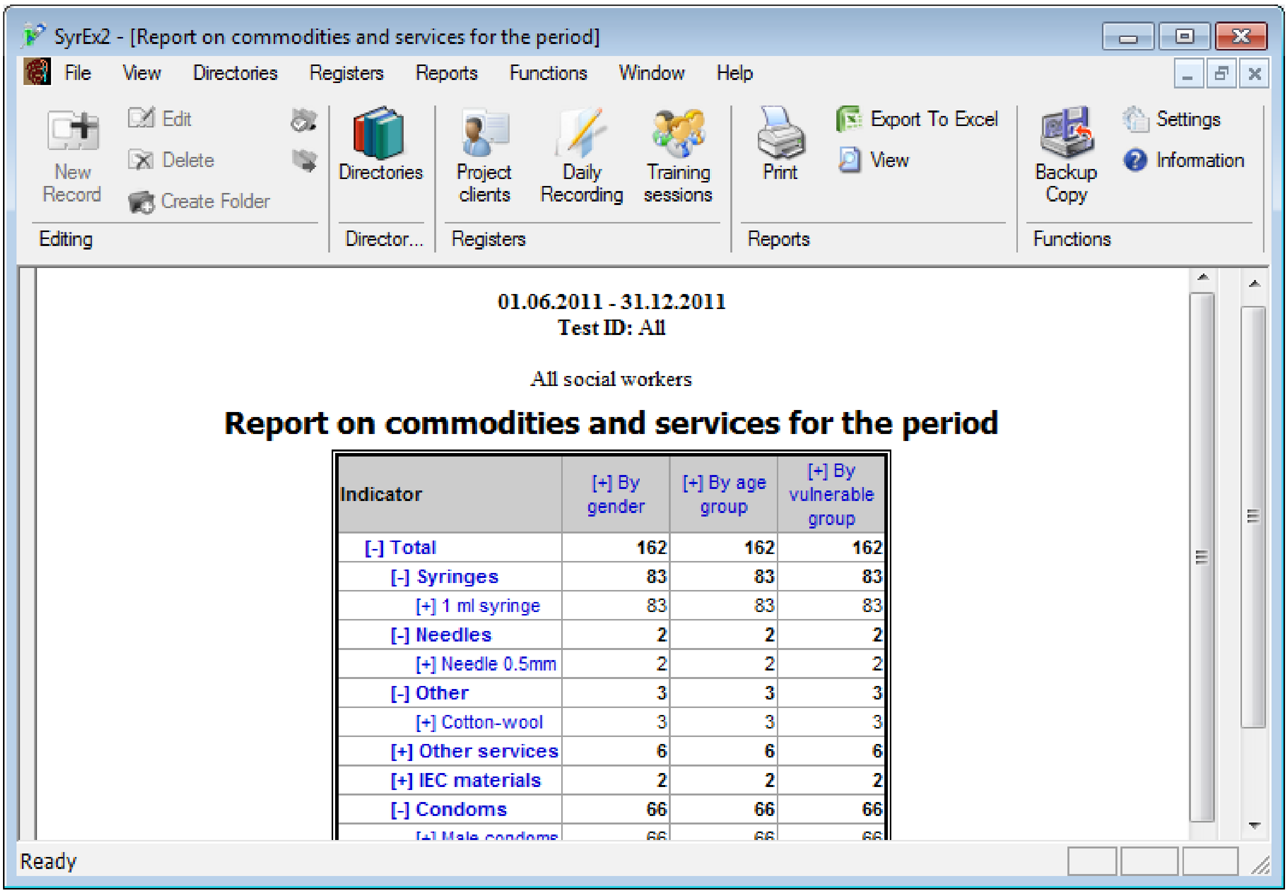


After the date, the sites and the advanced options (for the Coverage report) have been selected, please click the *Generate* button. This will open a window with the report generated. Be ready that on the big databases the report generation may take some time.

When the *Edit* button is clicked, the window with report generation options will show up again, and the *Edit* button will be replaced with the *Generate* button.

3.5.1. Report on commodities and services for the period

This type of report contains summary information on commodities distributed and services provided. To have such a report generated, you must set its basic parameters: *Period* and *Service Delivery Sites*.



01.06.2011 - 31.12.2011
Test ID: All

All social workers

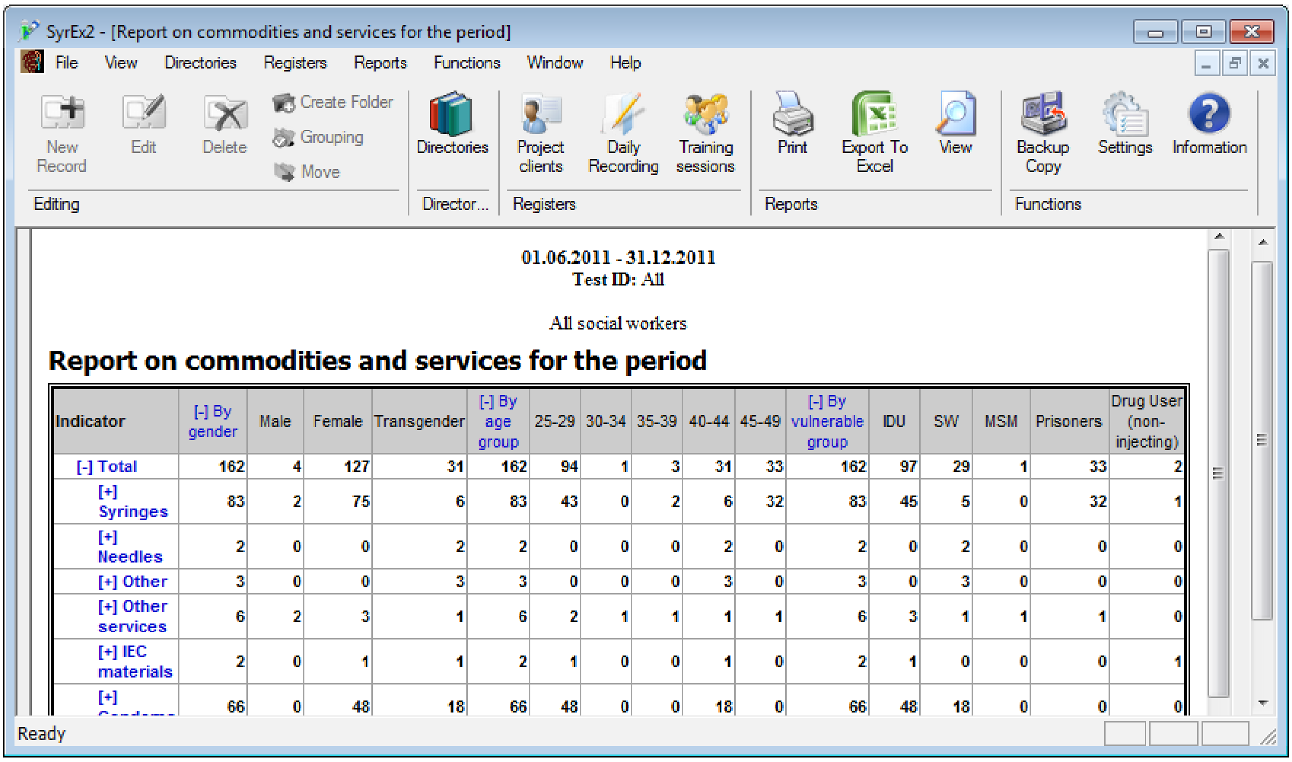
Report on commodities and services for the period

Indicator	[+] By gender	[+] By age group	[+] By vulnerable group
[-] Total	162	162	162
[-] Syringes	83	83	83
[+] 1 ml syringe	83	83	83
[-] Needles	2	2	2
[+] Needle 0.5mm	2	2	2
[-] Other	3	3	3
[+] Cotton-wool	3	3	3
[+] Other services	6	6	6
[+] IEC materials	2	2	2
[-] Condoms	66	66	66

The lines and columns, **marked in blue**, represent grouped commodities and services provided (lines), and groups of clients (columns). You can click the title and view detailed information about each commodity in the group, or conversely, minimize the group, and see the summary totals. The groups are automatically formed by configuration.

- "+" in the name of a category means that the group can be maximized.
- "-" means that the group is already maximized.

For example, if you minimize all the groups of commodities, and maximize grouping for a vulnerable group, the report will look like this:



01.06.2011 - 31.12.2011
Test ID: All

All social workers

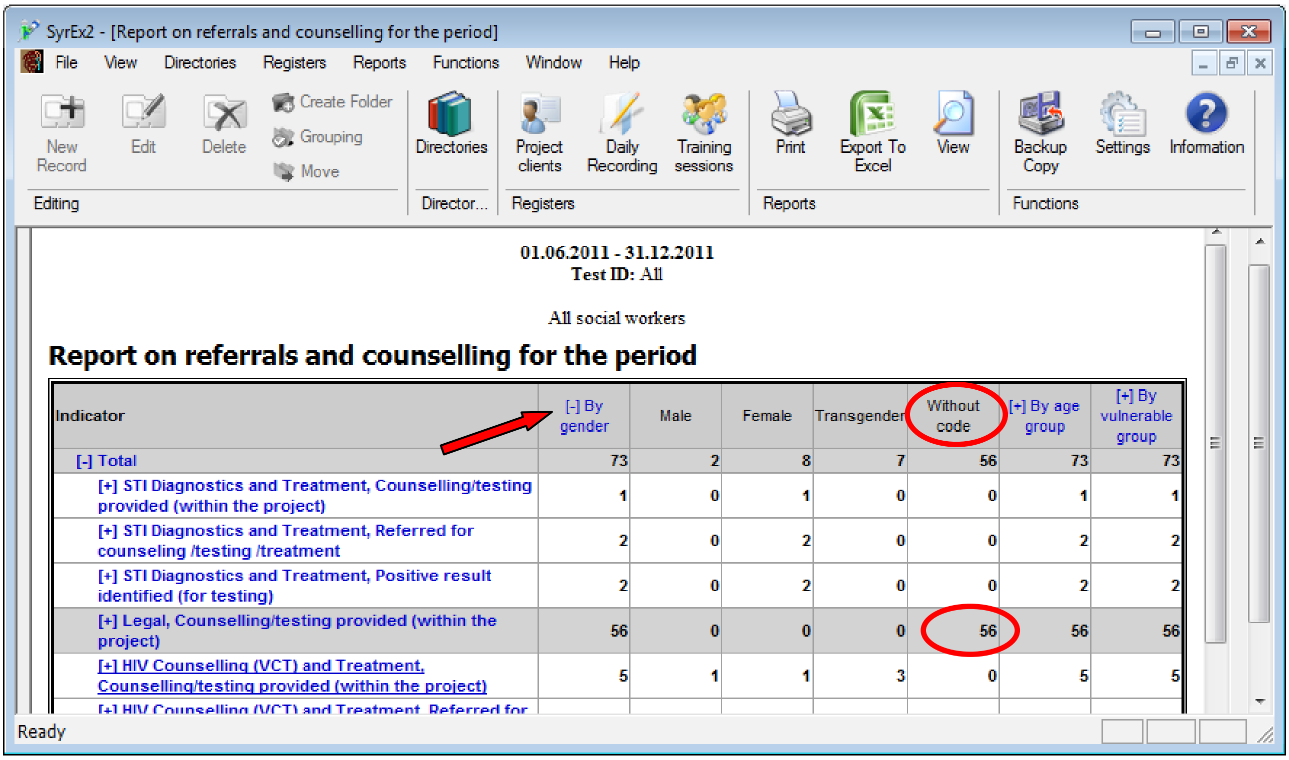
Report on commodities and services for the period

Indicator	[-] By gender	Male	Female	Transgender	[-] By age group	25-29	30-34	35-39	40-44	45-49	[-] By vulnerable group	IDU	SW	MSM	Prisoners	Drug User (non-injecting)
[-] Total	162	4	127	31	162	94	1	3	31	33	162	97	29	1	33	2
[+] Syringes	83	2	75	6	83	43	0	2	6	32	83	45	5	0	32	1
[+] Needles	2	0	0	2	2	0	0	0	2	0	2	0	2	0	0	0
[+] Other	3	0	0	3	3	0	0	0	3	0	3	0	3	0	0	0
[+] Other services	6	2	3	1	6	2	1	1	1	1	6	3	1	1	1	0
[+] IEC materials	2	0	1	1	2	1	0	0	1	0	2	1	0	0	0	1
[+]	66	0	48	18	66	48	0	0	18	0	66	48	18	0	0	0

3.5.2. Report on counseling and referrals for the period

This report shows summary details for services, entered into the directories, as counseling. When a report is being generated, they are shown in it as counseling, recorded in the daily record forms by ID (e.g. HIV testing) as well as those which are entered as a sum total without tying in to a specific client (e.g. General legal counseling).

In the table of the generated report, after clicking the "+" sign alongside the title of one of the columns (e.g. "By Gender"), the following sub-items will be displayed: "Male", "Female", "Transgender", "Without Code".



01.06.2011 - 31.12.2011
Test ID: All

All social workers

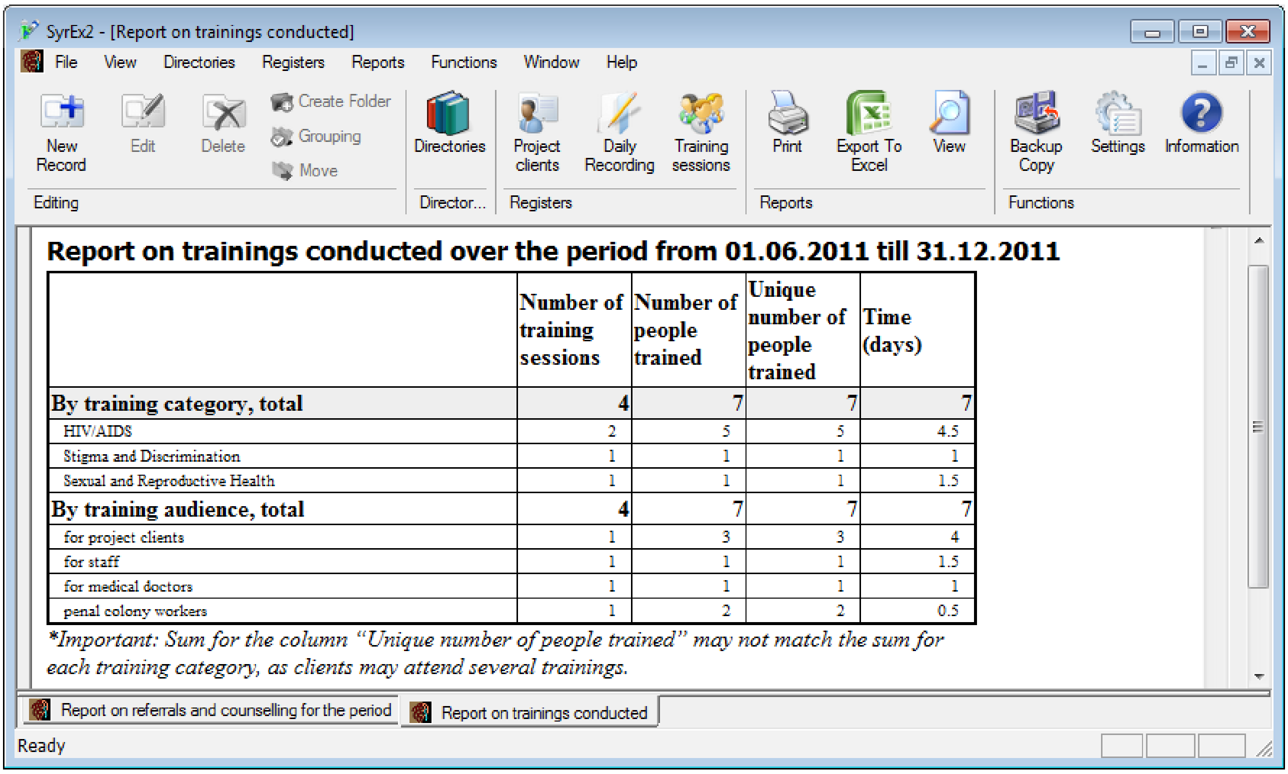
Report on referrals and counselling for the period

Indicator	[-] By gender	Male	Female	Transgender	Without code	[+] By age group	[+] By vulnerable group
[-] Total	73	2	8	7	56	73	73
[+] STI Diagnostics and Treatment, Counselling/testing provided (within the project)	1	0	1	0	0	1	1
[+] STI Diagnostics and Treatment, Referred for counseling /testing /treatment	2	0	2	0	0	2	2
[+] STI Diagnostics and Treatment, Positive result identified (for testing)	2	0	2	0	0	2	2
[+] Legal, Counselling/testing provided (within the project)	56	0	0	0	56	56	56
[+] HIV Counselling (VCT) and Treatment, Counselling/testing provided (within the project)	5	1	1	3	0	5	5
[+] HIV Counselling (VCT) and Treatment, Referred for							

3.5.3. Report on training sessions conducted

This report enables the user to view the number of training sessions conducted, numbers of people trained (total and unique) as well as the total length of all training and thematic lessons conducted in the period specified. To have a report generated, you have to specify the *Period* and *Service Delivery Sites*.

This information can be viewed with a breakdown by training topic and target group.



Report on trainings conducted over the period from 01.06.2011 till 31.12.2011

	Number of training sessions	Number of people trained	Unique number of people trained	Time (days)
By training category, total	4	7	7	7
HIV/AIDS	2	5	5	4.5
Stigma and Discrimination	1	1	1	1
Sexual and Reproductive Health	1	1	1	1.5
By training audience, total	4	7	7	7
for project clients	1	3	3	4
for staff	1	1	1	1.5
for medical doctors	1	1	1	1
penal colony workers	1	2	2	0.5

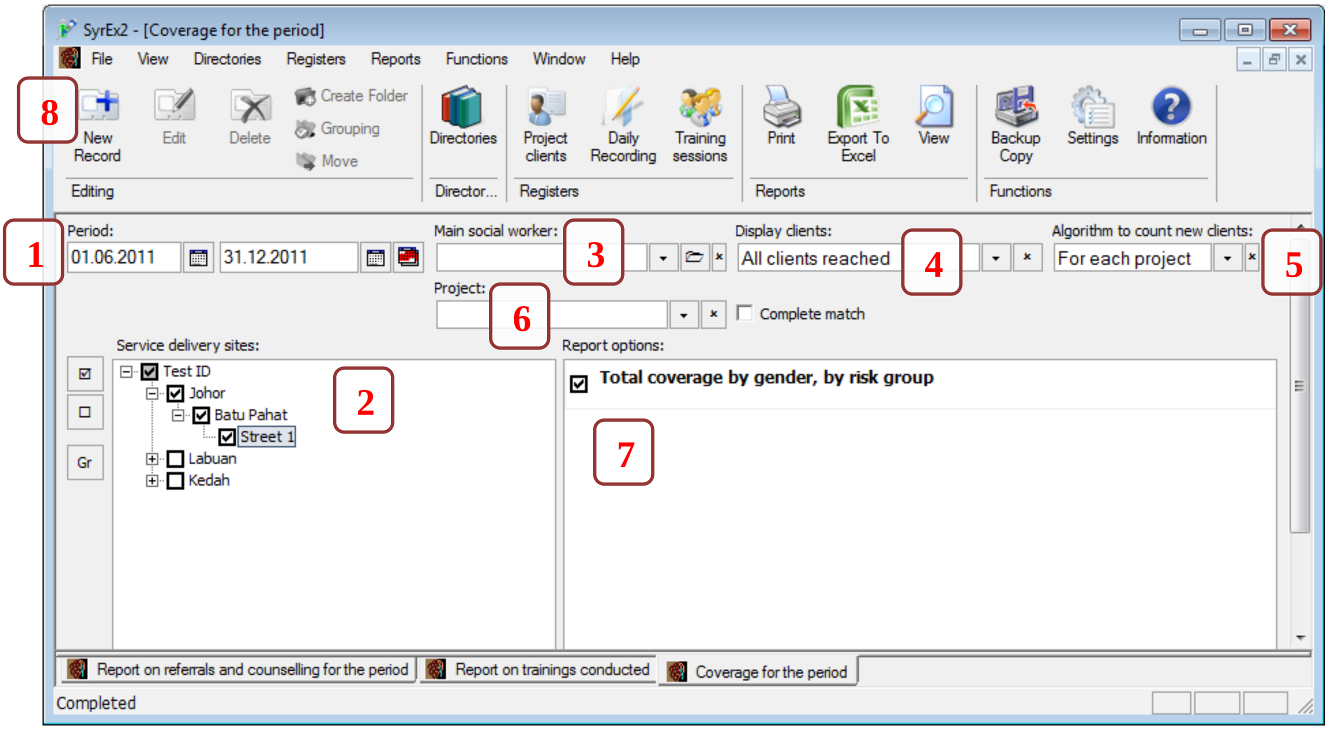
**Important: Sum for the column "Unique number of people trained" may not match the sum for each training category, as clients may attend several trainings.*

3.5.4. Coverage for the period

The report on coverage for the period indicates people who received at least one commodity or service during the reporting period. Client who participated only in training and didn't receive any commodities or services won't be counted in the coverage.

This report has some differences from other reports: it's more complicated; it has much more options and may provide a wide range of information (client coverage, clients' characteristics, distributed materials and services etc.).

Coverage for the period report has some fields that we already mentioned in the previous reports and some others, which concern only this report. Let's consider them all.



1. Period;
2. Service delivery site (in example with grouping Organization – Region – Site);
3. Main social worker;
4. Display clients: three completely different counting methods may be chosen.

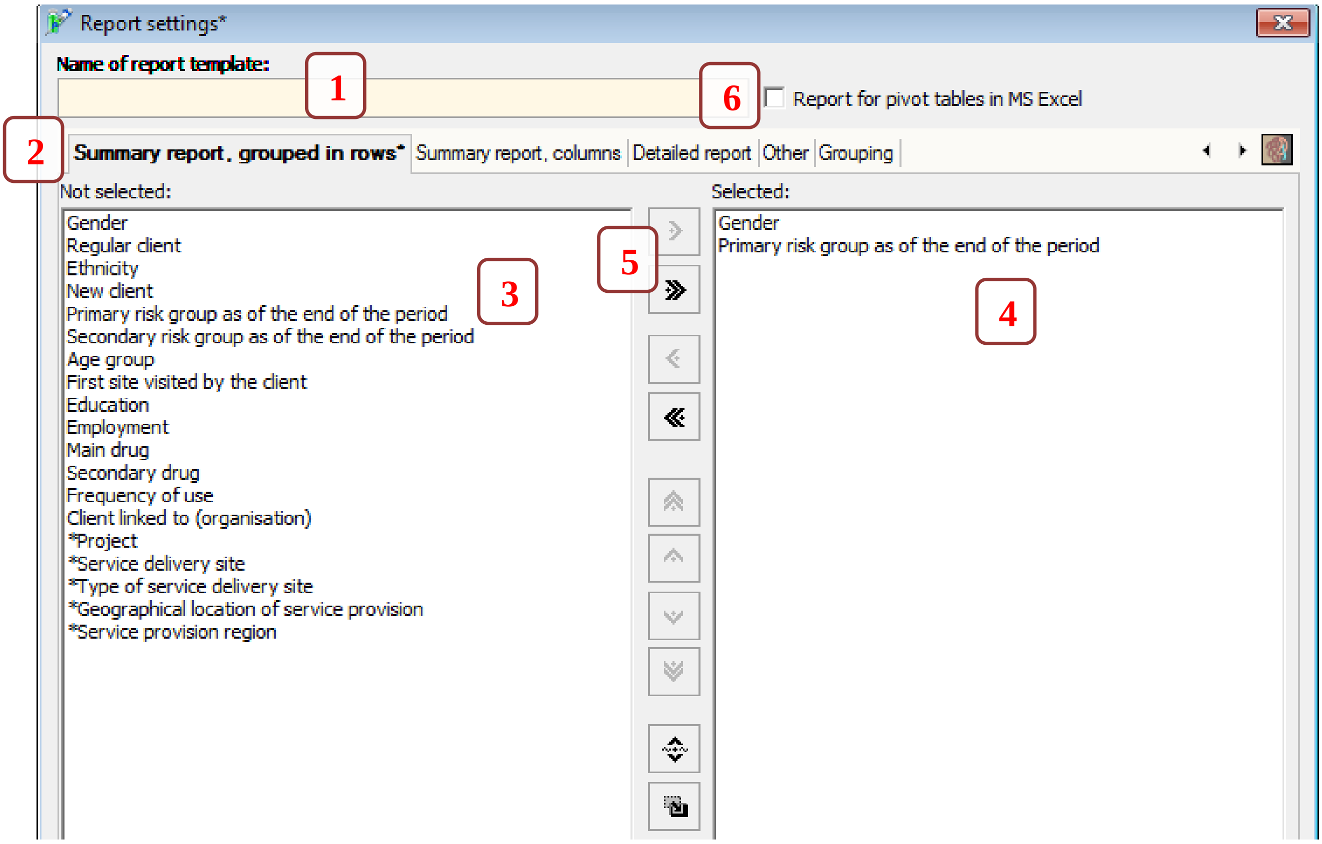
   - All clients reached: report will show all the clients who receive at least one commodity or one service in the period;
   - New clients: report will indicate only new clients, namely those who were pup in the database and received their first commodity or service in the chosen period. Clients were registered and received services in the previous periods and whose Client ID was changed in the reporting period won't be counted as new clients. Notice that if client's information was included in the database (Project clients' cards) for example in June but the first services were received (Daily recording) in July – he would be counted as the new client covered only in July.
   - Regular clients: clients are considered regular if they have used project services at least one time in a month in the course of twelve months. This type of report can be generated only for a period of one year, so you'll have the number of regular clients as of the last day of the period.

5. Algorithm to count new clients: three algorithm to be chosen:

   - For the whole country: client is counted as new one if he appeared first within all country database. For example, the new client of organization A who earlier receiver services in organization B is not new one in the reporting period for the country on the whole, so he will not be counted as new client under this algorithm.
   - For each project: if the client has already received services under some other projects but in this period he was firstly covered by the current project – he will be counted as new client for that project.
   - For each organization: the client who has his first visit in current organization in the reporting period will be counted as new and shown in the report under this algorithm.

6. Project. If you want to generate coverage report for all projects – leave this field blank.

7. Report options. Obligatory field. The list on option groups can be set by the use of the report constructor. This instrument is available only for *Coverage for the period* report and is operated by clicking on left-up corner buttons (number 8): New record, Edit, Delete. By clicking on new record button the following window will appear:



7.1. Name of report template.

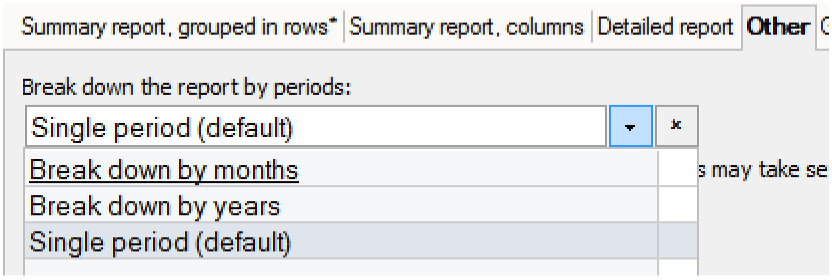
7.2. Data output options:

- Summary report, grouped in rows: there you may choose the list of summarized groups by which you want to see the distribution of data.
- Summary report, columns: data numeric fields with client coverage and other connected information that will be extracted according to the fields selected in the previous option. Some fields are quite similar: for example “Male condoms” and “Clients who received male condoms”. The difference between them is that the first one (ex. “Male condoms”) will show the number of commodities or services, units, distributed between the group of clients in the row. Another one (ex. “Clients who received male condoms”) will show the number of clients who received at least one of the mentioned commodity or service.

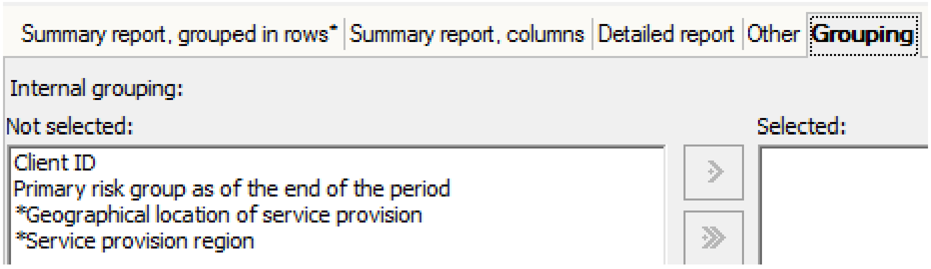
	Clients	Male condoms	Clients who received male condoms
IDU	100	200	90

In the example above 100 clients were covered by different services during the period. 200 condoms were distributed amoung IDUs. 90 IDUs from 100 received at least 1 condom from 200.

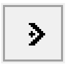
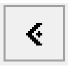
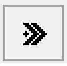
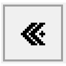
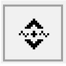
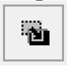
- Detailed report: if you want to see the detailed client-by-client coverage information, please, choose the fields from this block. One report option group can contain both summary and detailed report.
- Other: option where you may choose the breakdown of the general reporting period.



- Grouping: this option is used whaen you want to find out how many service delivery sites provide services to the representatives of different group. For this select the following options: Summary report, grouped in rows – Primary risk group for the end of the period; Summary report, columns – Service delivery sites; Grouping - Primary risk group for the end of the period.

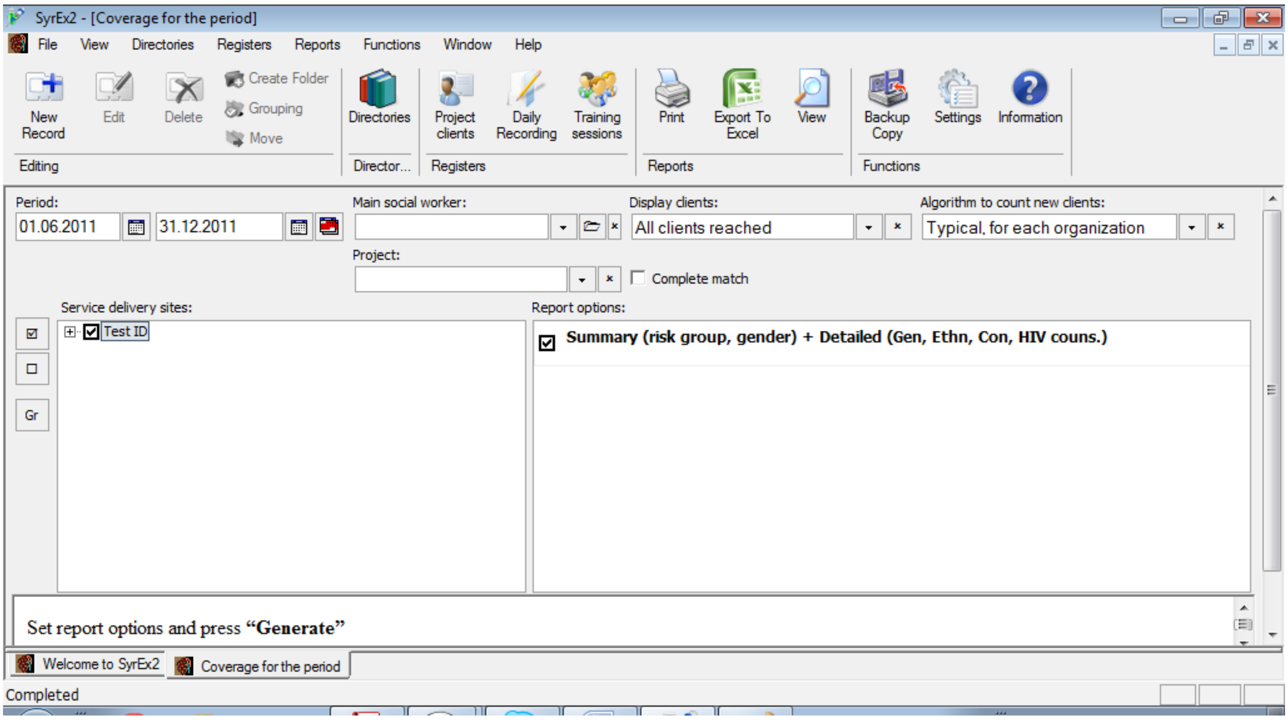


7.3. Not selected fields.
7.4. Selected fields.
7.5. Control panel:

- ,  - move right and left one-by-one;
- ,  - move right and left all together;
- ,  - move up and down one-by-one;
- ,  - move up and down all together;
-  - split the selected items on two or more groups, for each group a separate report table will be formed;
-  - copy chosen selected items.

7.6. Report for pivot tables in MS Excel mark: if marked the report will be suitable for further analysis utilizing pivot tables.

For example, the Coverage report with summary options: primary risk group, gender in rows, unique clients, visits, syringes and condoms distributed – in columns, together with detailed report with client ID, gender, ethnicity and condoms and HIV counseling received will be set like this:



Click Generate in the right-down corner.

All clients for the period

The period from **01.06.2011** till **31.12.2011**

Client ID	Gender	Ethnicity	Male condoms distributed	HIV Counseling (VCT) and Treatment
1NM781-123	Male	Malay		1
1WW761-999	Male	Malay		
2NH867-1234	Female	Unknown	48	1
2RR654-777	Female	Sarawakian		
3GG673-3444	Transgender	Indian		
3NF675-888	Transgender	Sabahan	18	3

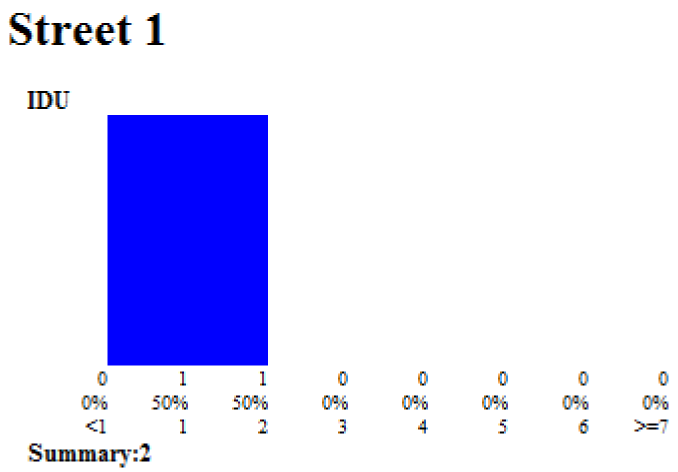
	Unique clients	Visits	Syringes distribu-ted	Male condoms distribu-ted
Total	6	17	83	66
IDU	2	8	45	48
Male	1	2	2	
Female	1	6	43	48
SW	1	4	5	18
Transgender	1	4	5	18
MSM	1	2		
Male	1	2		
Prisoners	1	2	32	
Female	1	2	32	
Drug User (non-injecting)	1	1	1	
Transgender	1	1	1	

3.5.5. Visits distribution

This report shows how regular a client's visits are, with a separate focus on all vulnerable groups. This type of report can be generated only for a period of one month.

The period. In order to select a reporting period for this type of report you should specify the date that determines the beginning of the reporting month. The reason is that this type of report can be generated only on a monthly basis.

The report is generated for all the existing service delivery sites both singly and all together at the end of the report.

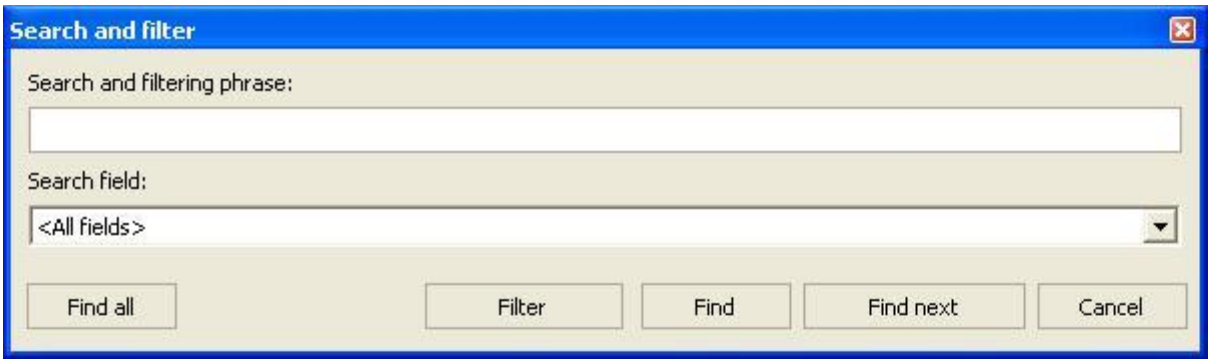


Example above shows us that during selected month 2 IDU clients visited Street 1. One client visits that site 1 time and another one client visit that site 2 times. So first row is the number of clients; second – percent of the clients in the first row of the total number of clients; third row shows number of visits to the site.

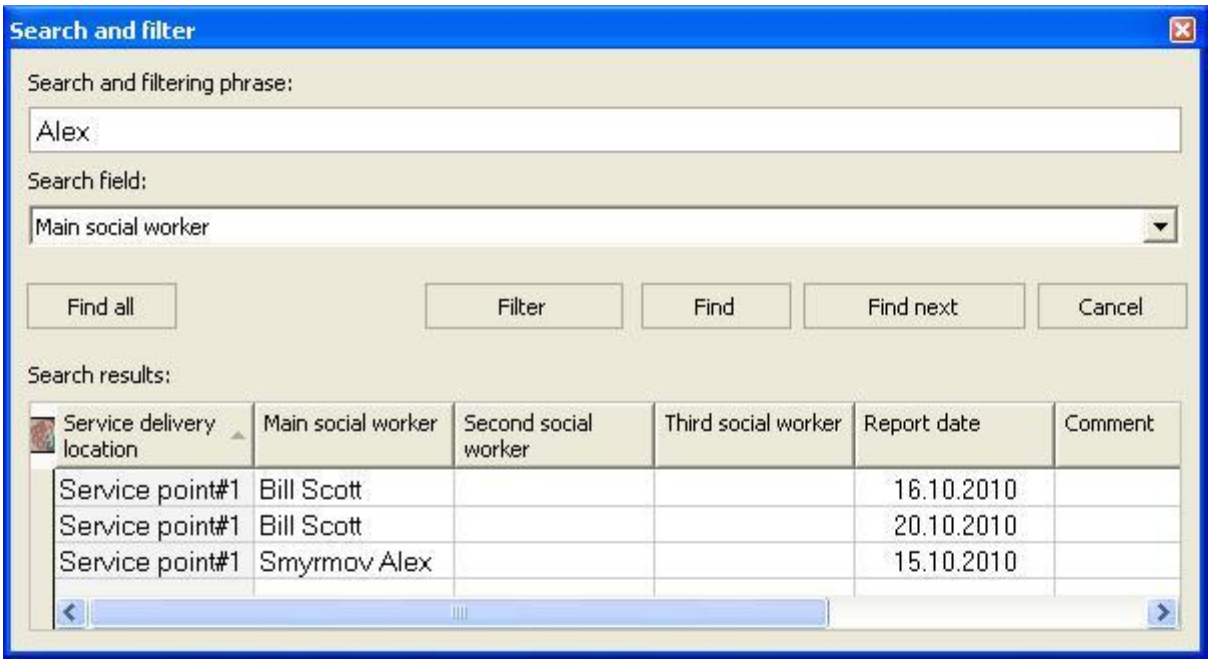
4. Other program functions

4.1.Search and Filter

You can call up a search and filter dialog box in all operating modes when the lists of records are displayed (Project *clients, Daily recording sheets, etc.*), using the Ctrl+F key combination.



The ***"Find All"*** option displays all the records which satisfy the set condition in the search and filter window.



If a search condition is set, then clicking the ***"Find"*** button will mark the first record in the primary window that meets the requirement. Clicking the ***"Find next"*** button will mark all the records in the basic list that satisfy the requirement one by one.

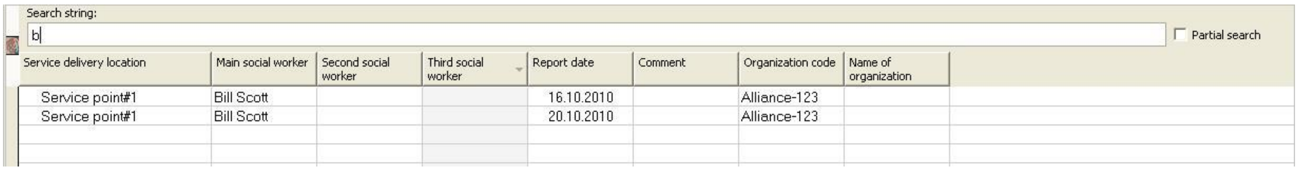
If a filter condition is set, then clicking the "filter" button will display only those records in the basic list that satisfy the requirement.

Using the ***"Cancel"*** button will redisplay all the records.

The Search and Filter options will also function if you specify a partial word, phrase or number in the search condition.

A quick search filter can be activated simply by typing in a search request on the keyboard. If the filter conditions are changed, the records displayed will automatically change. The filtering option will be applied to all the fields displayed.

For example, the result, displayed after you have simply typed in a "b" string on the keyboard, will be like this:



Records that meet the set requirement have been identified.

4.2.Data transfer

There are some different formats of data transfer files in the program:

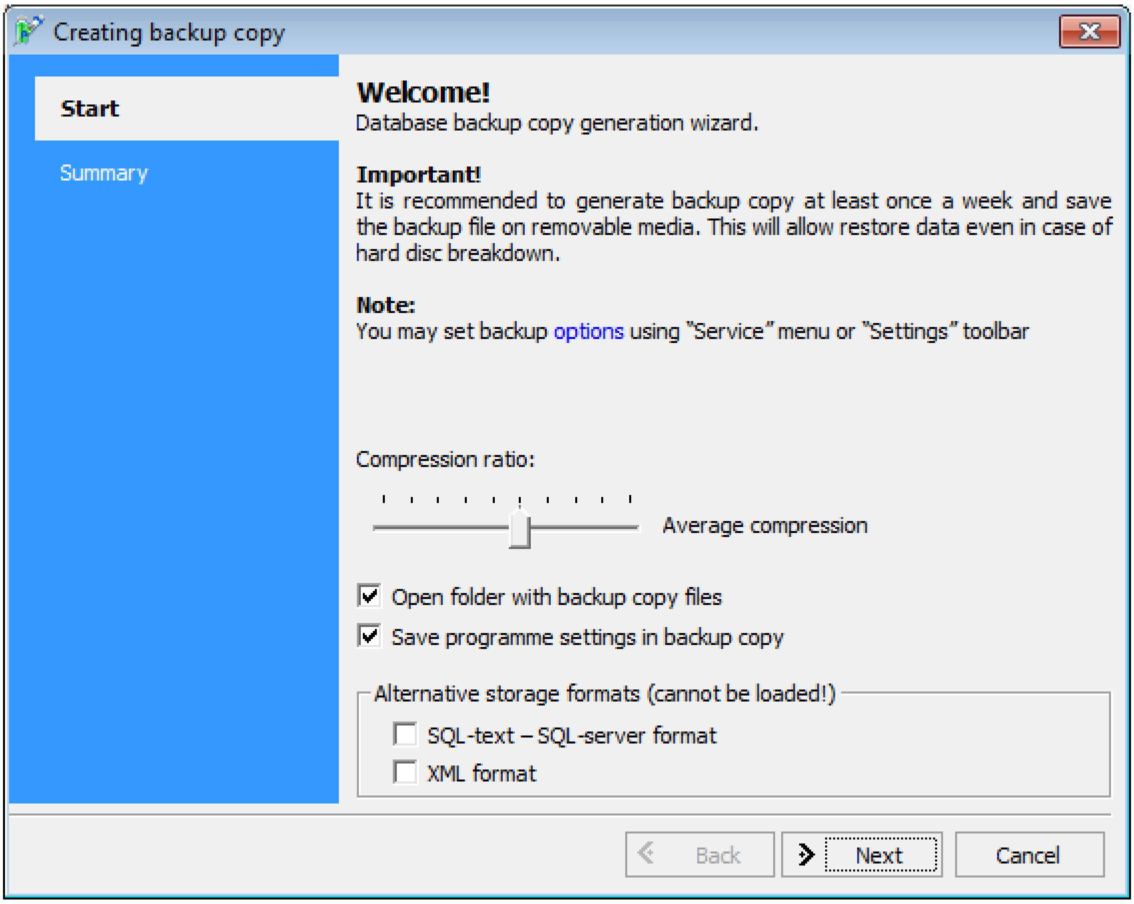
File format	Description	Export from SyrEx2	Import in SyrEx2
.bkz2	So called Backup copy for data recovery. Should be done every four days. If uploaded in the program – replace all the data currently existed.	+ (Functions → Create Backup Copy)	+ (Functions → Database maintenance → Restore from backup copy)
.upz2	Data transfer file which is used for several organizations' data consolidation. If uploaded in the program – replace only the data of the same organization, the others organizations' data in the database is left unchanged.	+ (Functions → Data exchange → Transfer data)	+ (Functions → Data exchange → Receive data)
.dbf	Data file is intended for additional data analysis with the use of special programs.	+ (Functions → Data exchange → Export to dbf format)	-
.csv	Data file is intended for additional data analysis with the use of special programs.	+ (File → Export → Data export to csv format)	-
Excel file	All the tables in the program and all generated reports can be exported to Excel for additional analysis. Note – it's not the database copy but only a part of information.	+ *Export to Excel* button on the Toolbar	-

Let’s have a detailed look on first two file transfer instruments.

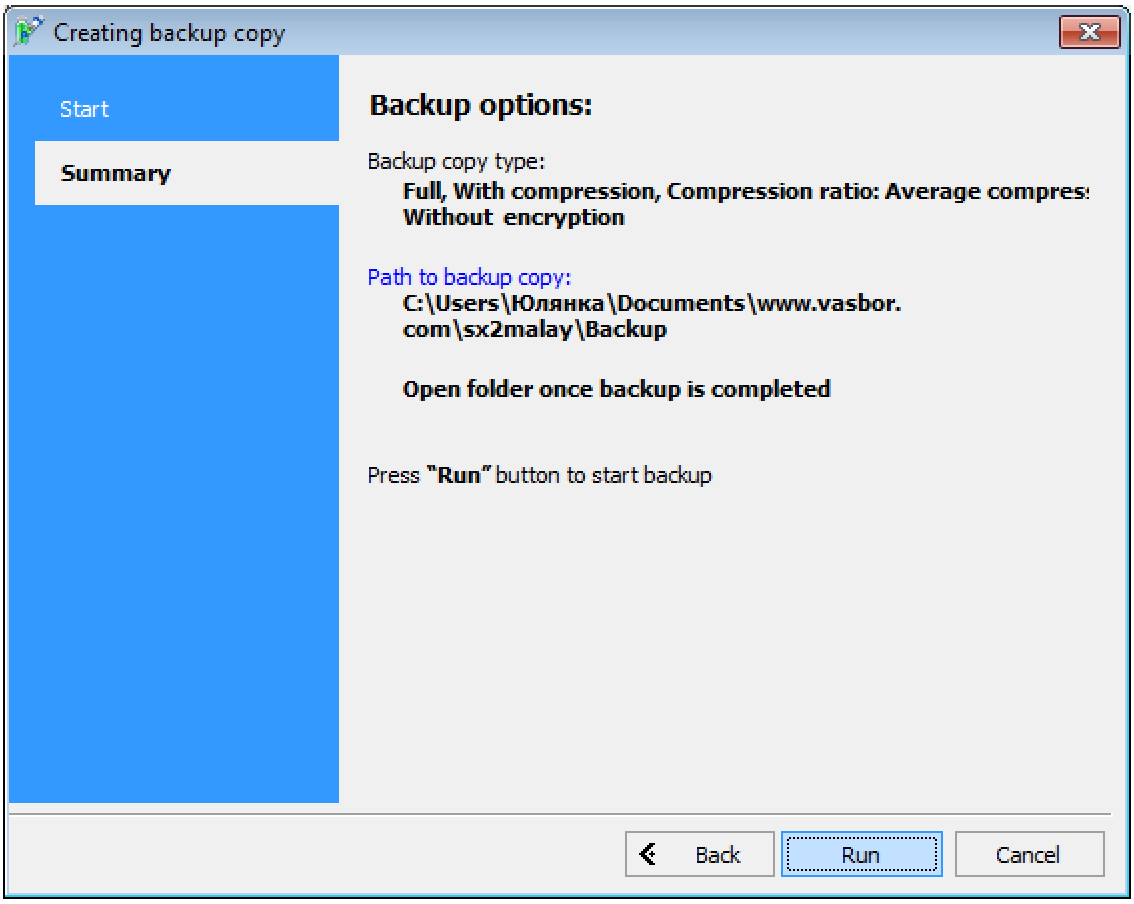
4.2.1. Backup copies

In order to <u>create a backup copy</u> of the database, please use the built-in backup feature available in the menu *Function* → *Create backup copy* or clicking the button 

.



It is not recommended to change settings in this window. Click “Next”.



Click “Run”. Wait a certain time (depending on the size of the database). When finished, click “Completed”.

The backup copy files are stored by default in the folder:

{My Documents}\www.vasbor.com\sx2malay\Backup, and have a .bkz2 extension.

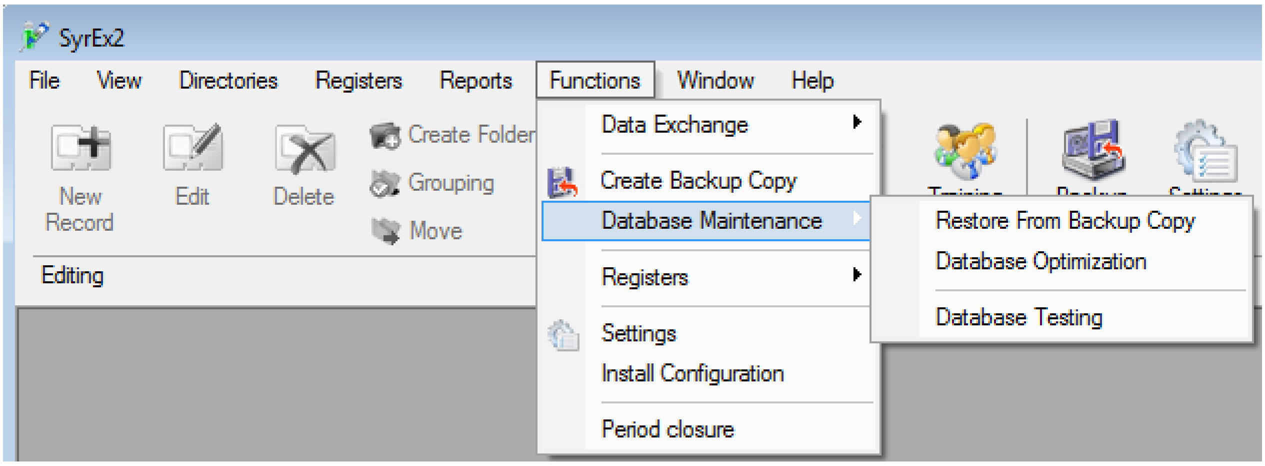
You can define the folder for storing backup copy files in the settings.

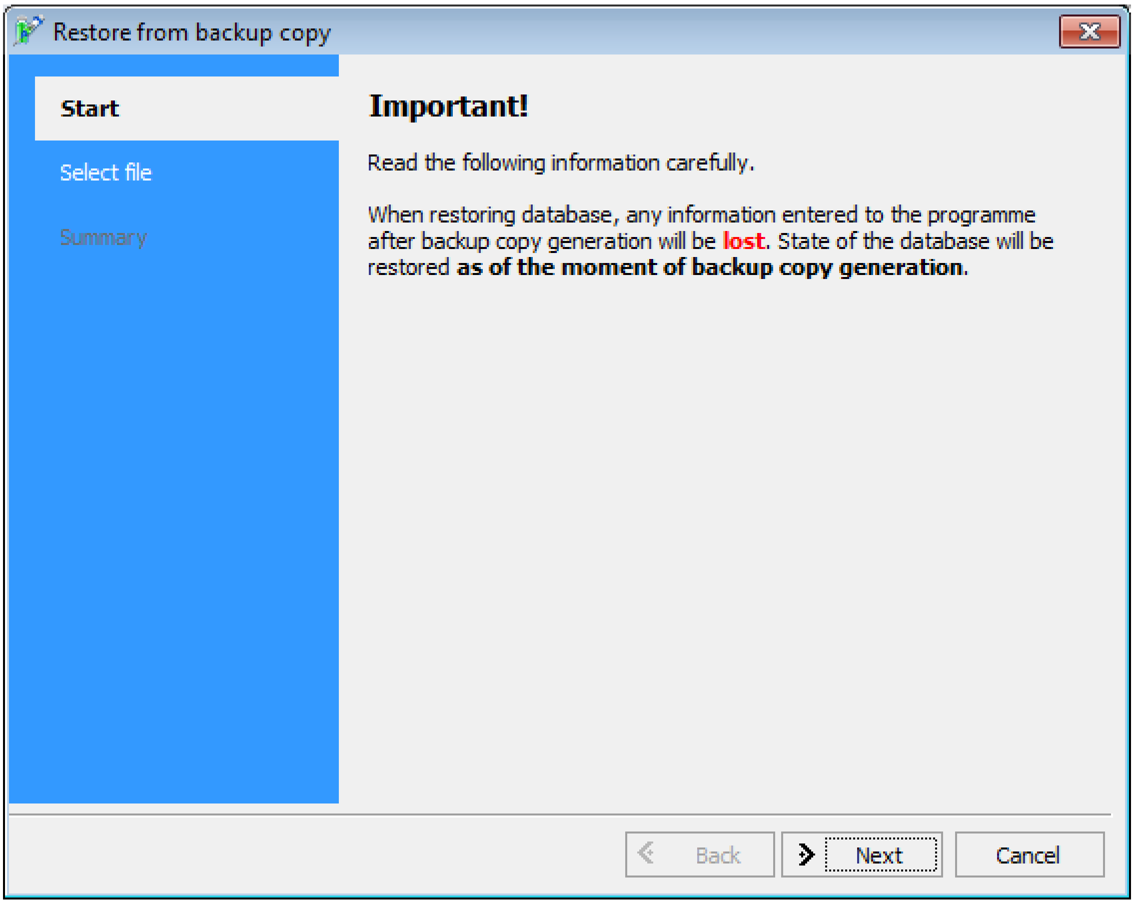
The name of the file contains the date and time of creating the backup copy in the following format year+month+date+hour+minutes+seconds, e.g. syrex2-20090824-151652.bkz2

Depending upon the configuration, if you do not make a backup copy at a proper time, the system will remind you that your backup copy is out of date, and you should make a new one. In the current configuration the system will send reminders, if the most recent backup copy is older than four days.

Attention! It is strongly recommended to store your backup copy files on external storage devices (floppy disks, CD-RW, USB flash drives) or on a network drive on another computer. This will prevent a complete loss of information in case of hard disk failure.

<u>To recover the database from the backup copy</u> please go to the menu *Functions* → *Database Maintenance* → *Restore from backup copy*.

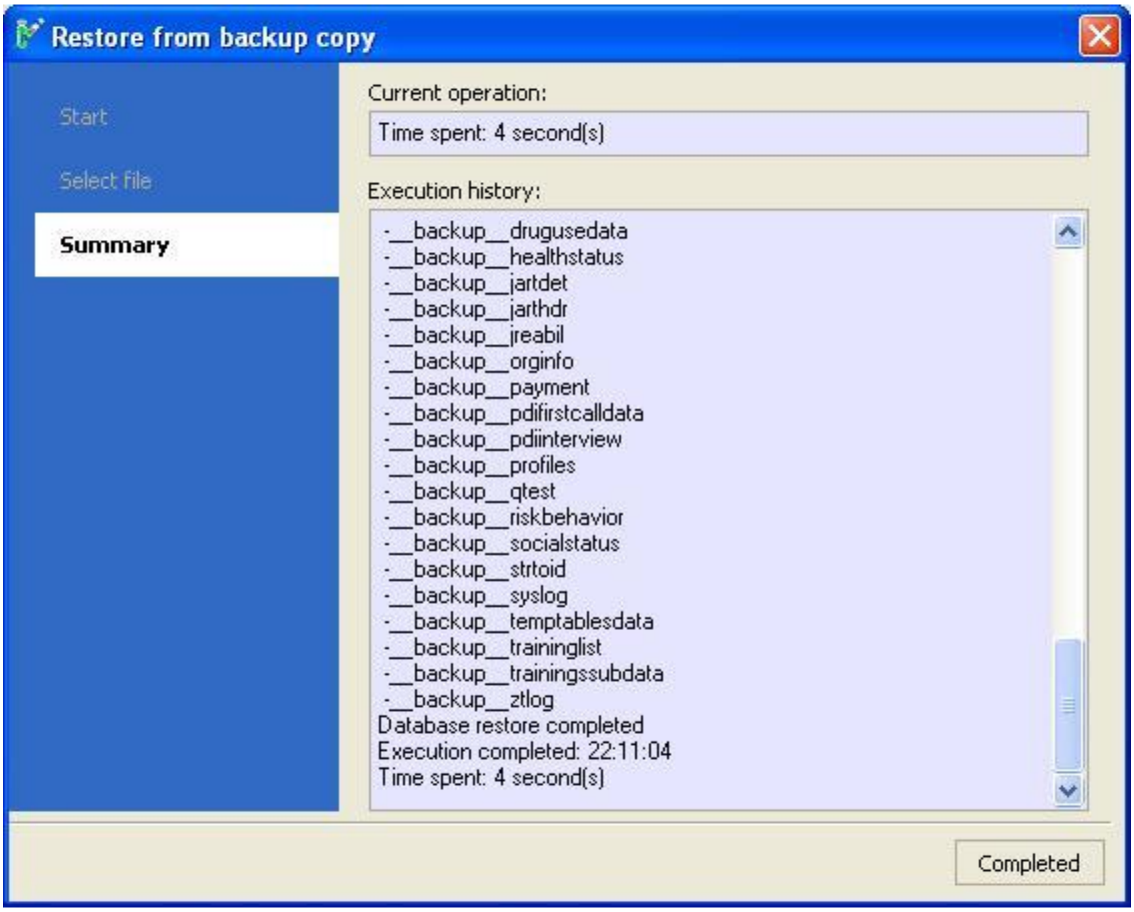




***Attention!* Data recovery from a backup copy will replace all existing data with information on your backup copy!**

If you are sure that you want to recover the data from the backup copy, click “Next”. Select the file from which you want to restore your database. **The current contents of your database will be irreversibly lost.**

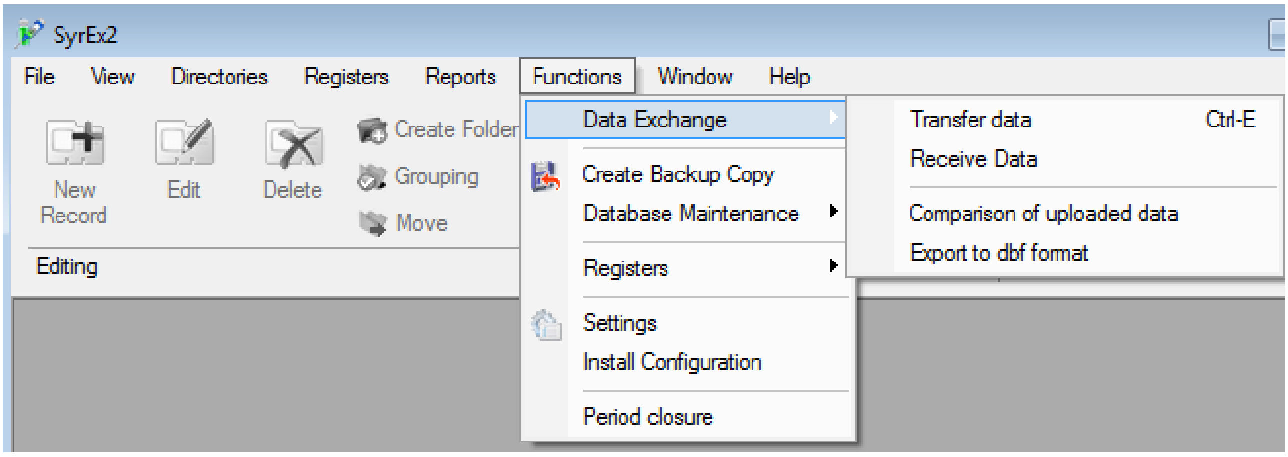
Hit “Next” and then click “Run” in the window that will appear. In the case of successful completion of the recovery process, the following message will show up:

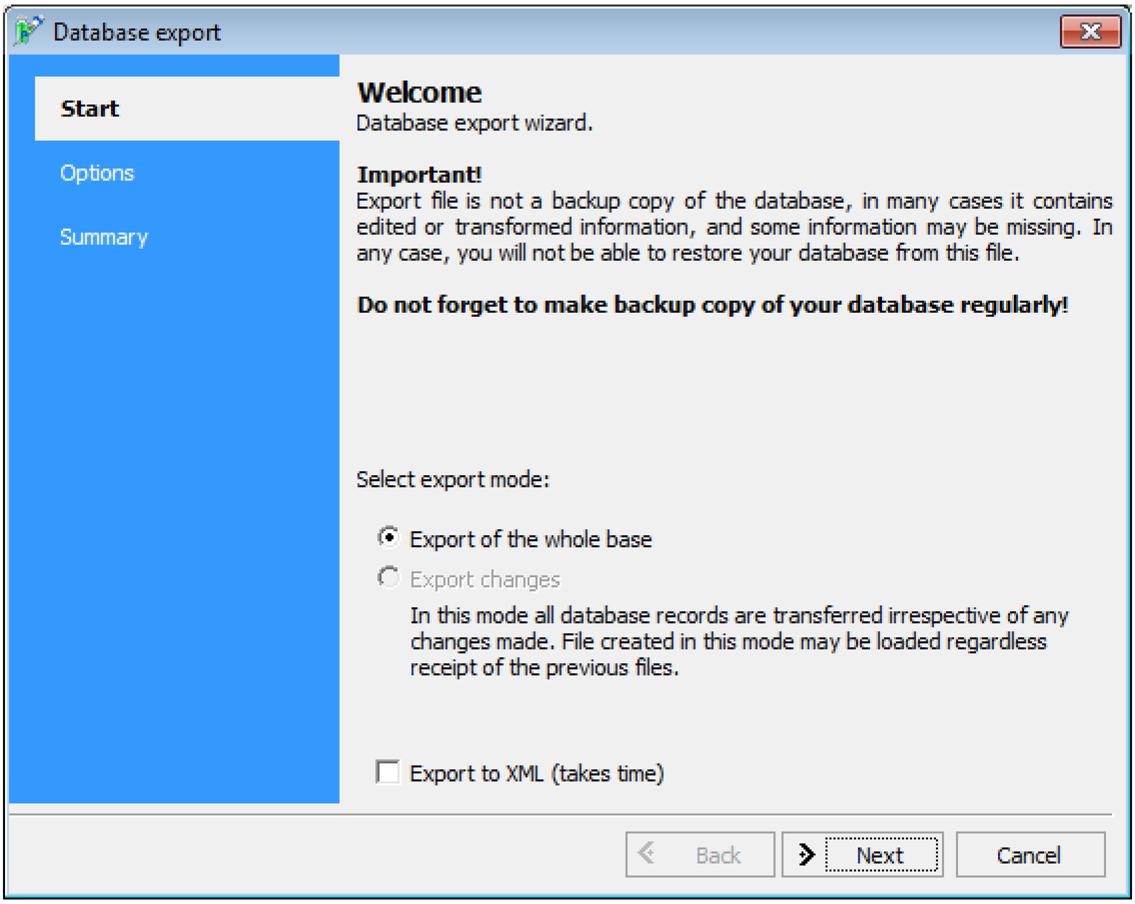


Click “Completed”. After that SyrEx2 will be restarted.

4.2.2. <u>Data Transfer for consolidation</u>

In order to prepare files for transfer in .upz2 format, go to the menu option Functions → *Data Exchange* → *Transfer Data*.

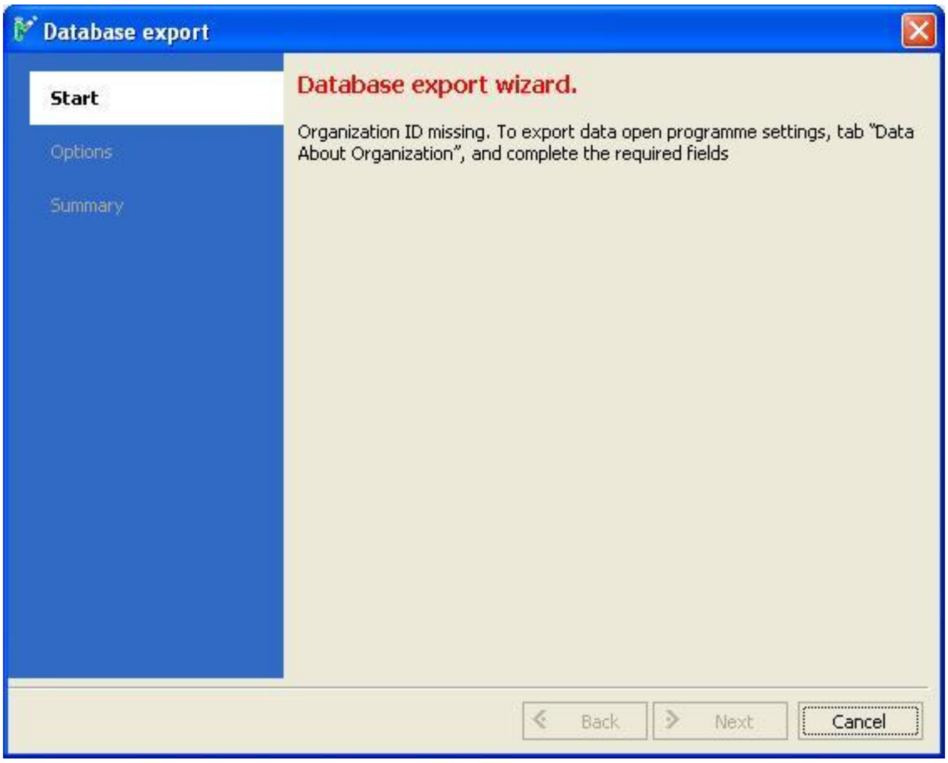




Click “Next”. Without changing the compression, hit “Next”. Now click “Run”. Wait until the procedure is finished and click “Completed”.

Important! Data Export will not be able completed if you don’t fill the Data about Organization[1].

[1] See 3.1.1. Organization directory and 5.2. Settings for detailes.



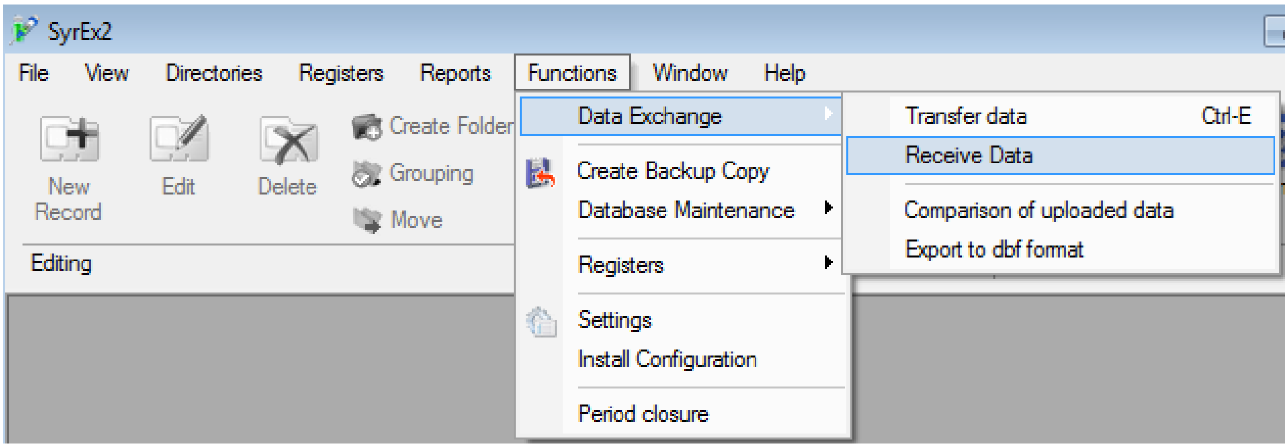
Data files for transfer are stored by default in the folder

{My Documents}\www.vasbor.com\sx2malay\Export, and have a *.upz2 extension.

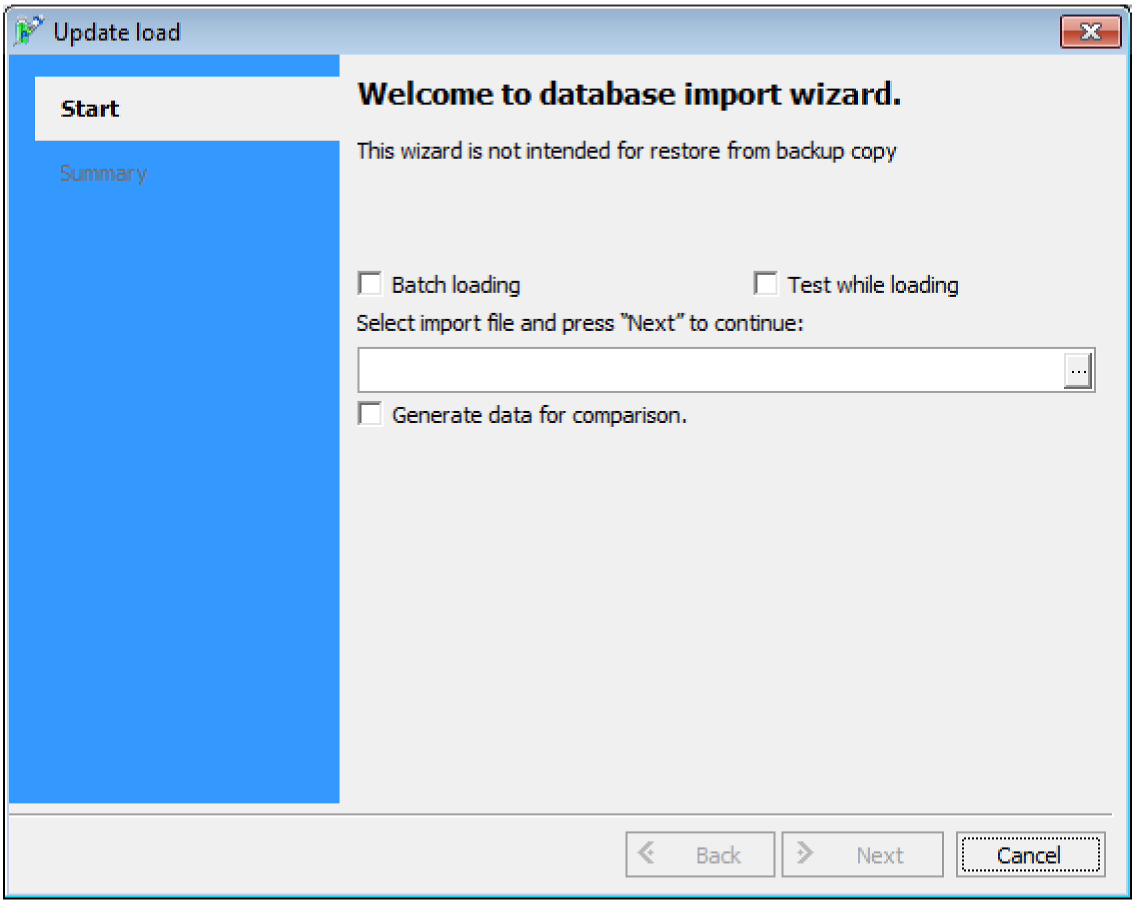
Upon completion of the data transfer procedure, the folder will be automatically opened.

Attention! The files created with the procedure of data transfer are not the same as the files created with the database backup procedure[1], and they cannot be used for proper information recovery in the database.

The .upz2 data reception feature allows the user to accumulate information, contained in several update files and arriving from different organizations, in one database. These files can be downloaded with a use of Receive data menu.



[1] See para. 4.2.1. Backup copy.



When choosing the “Batch Loading” option, it is necessary to select not a single file, but a folder with files in the address line. In this case, all the update files, contained in this folder, will be processed.

When selecting “Test While Loading” option, the file(s) will be additionally tested for errors. Please note that when this option has been selected, the system can take a longer time to load.

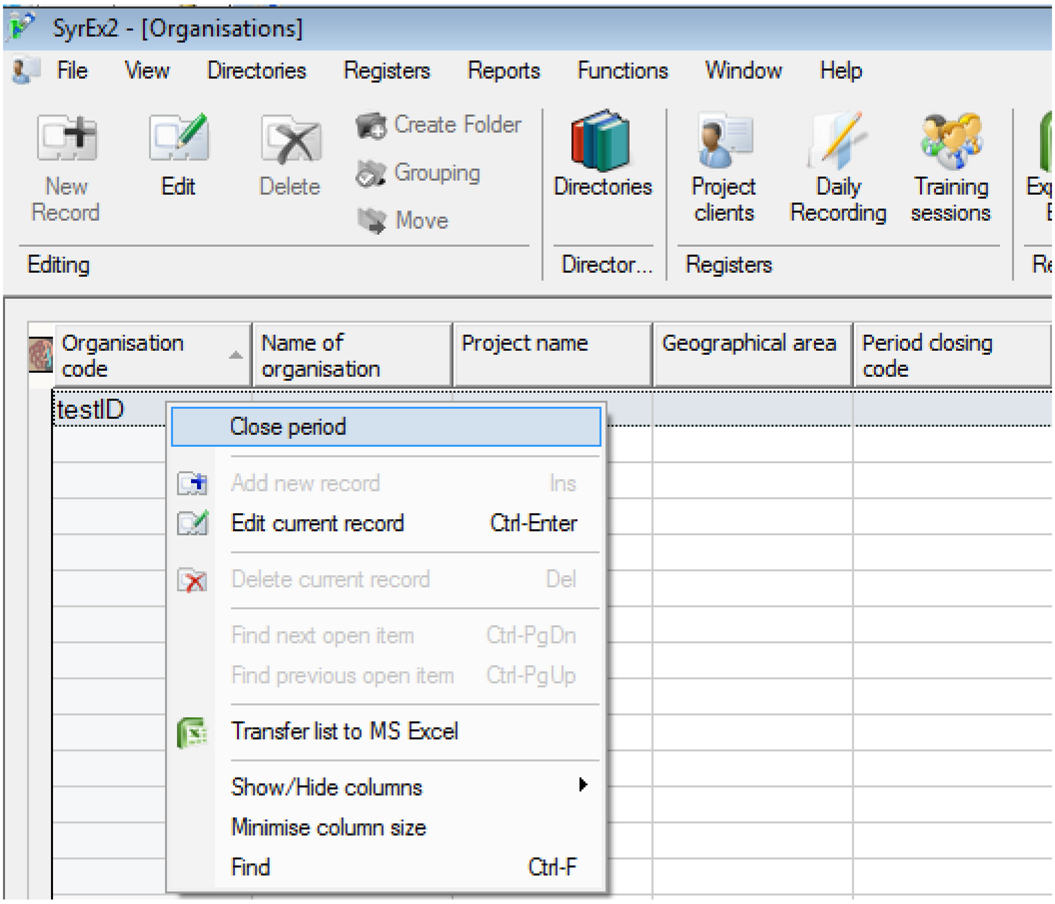
The “Generate data for comparison” option is used to find out the differences between two .upz2 files of one organization. You may select both two files for downloading (with “Bulk Loading” option) or download them one after another (use only “Generate data for comparison” option with each file downloaded).

4.3. Period Closure

Closing the previous reporting period represents an essential component of reporting requirements for any organization. In accordance with this procedure, the previous reporting period (as well as all the preceding periods) should be closed for the purposes of saving information after the organization’s report has been approved. After this period has been closed, no changes can be made to the organization’s records for the previous period of operation.

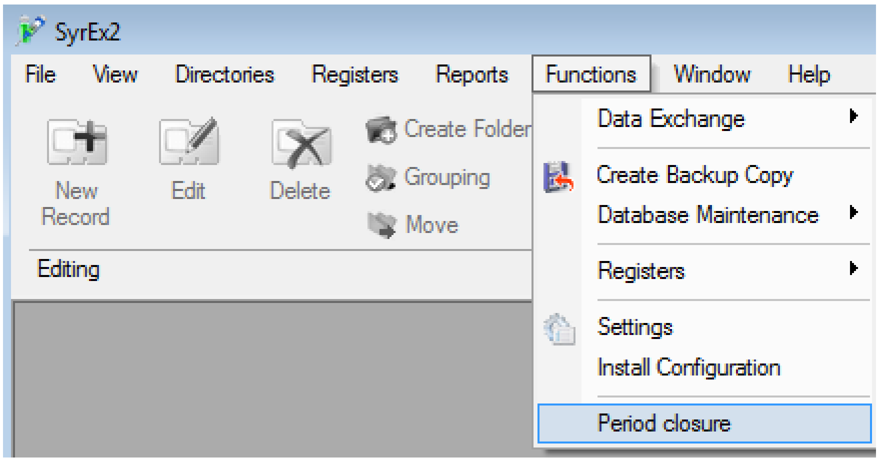
To generate the correct period closing codes the special Organization ID and password is required. Please apply to vasbor@vasbor.com for it.

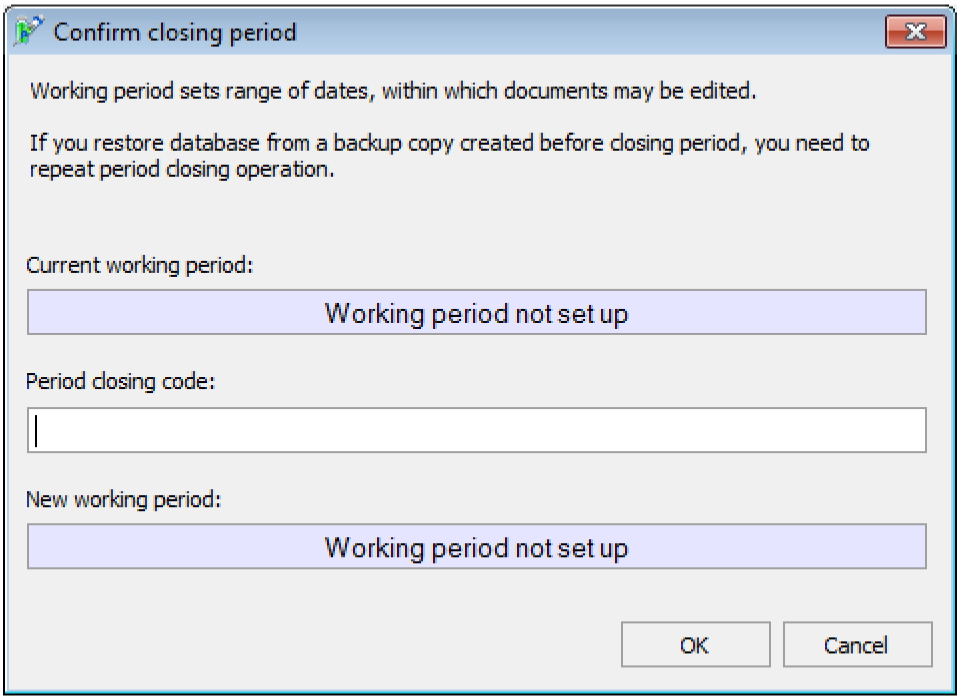
The codes generation is being done from Organization directory. Click on the right button of the mouse to open a menu:



Choose the date and click Run, then Complete. The codes will appear in the column *Period closing code.* To send them to organizations export the table to MS Excel.

To close the period please, open the *Function* → *Period closure* menu.





The closure procedure is as follows:

1) After the quarterly report has been approved, a reference code for the closing period is sent to the organization;
2) Enter the menu *Functions →Period Closure;*

The dates of the current operating period show which period is accessible for data entry; the date field for the new period remains blank until the reference code has been entered– these fields are filled in automatically.

3) Enter the reference code for the closing period into the appropriate line;

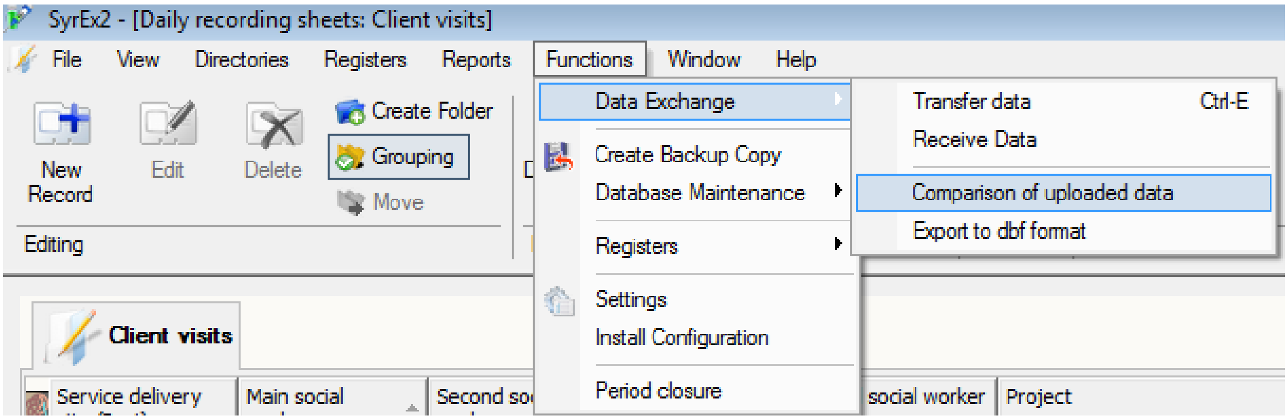
The date of the current operating period shows which period was accessible for data entry before entering the code and will be closed now and the date of the new period shows which period will be accessible for data entry– these fields are filled in automatically.

4) Click "OK";
5) When entering this section on the next occasion, by the date of the current period we will see which period is available for entering data.

4.4.Databases comparison

If you need to compare two database files of one organization you may use the special function. First upload two .upz2 files of the same organization[1]. Then open the *Comparison of uploaded data* menu.

[1] See para. 4.2.2. for information.



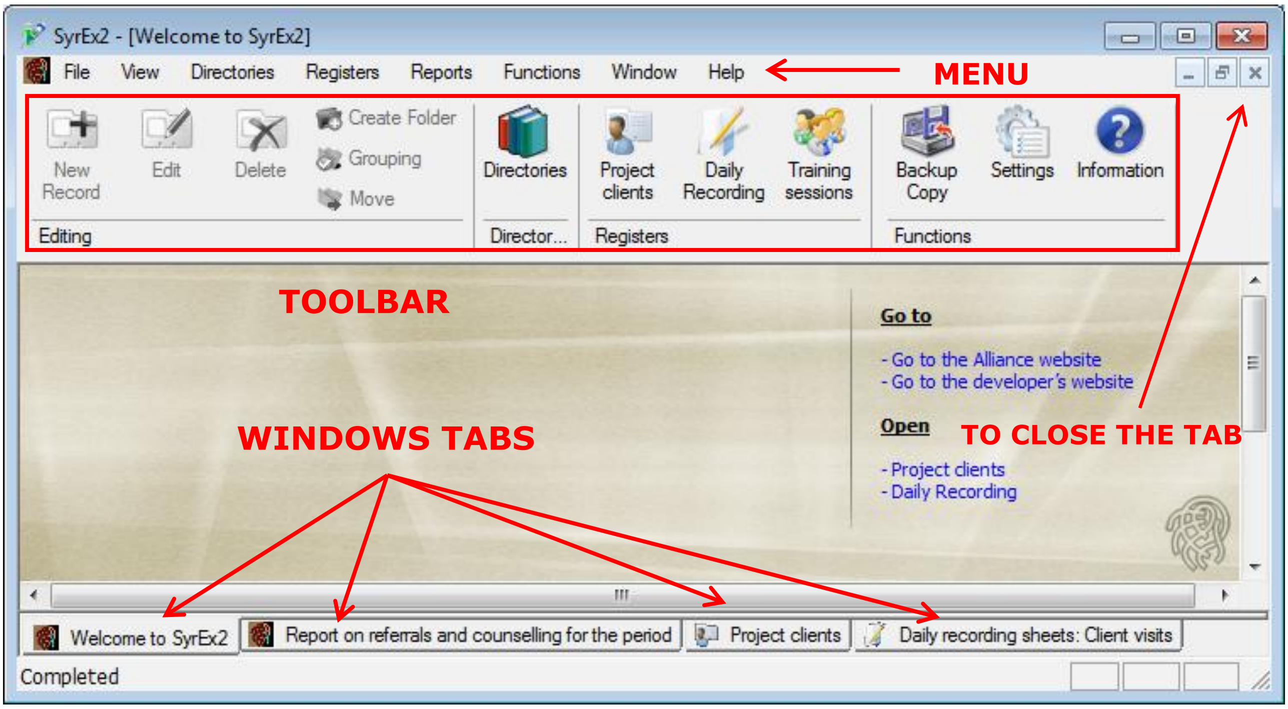
Mark the organization you want to analyze, the date as of what you want to compare the databases and click Compare.

5. About the program

This section provides information about each option and operating mode of SyrEx2.

5.1.Menu Structure, General Information

The program interface elements are shown in the figure below:



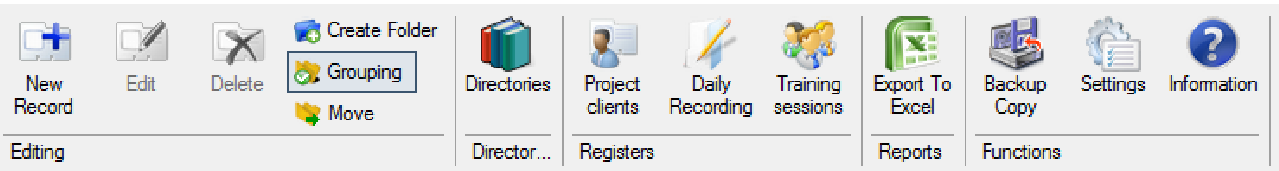
If the *Toolbar is* not displayed, it can be switched on, using the relevant option in the *View* menu.

In SyrEx2, when a section is being opened, the program creates a tab. Thus, you can simultaneously work with several sections of the system: guides, client lists, daily record forms, etc.

In order to move from one section to another, you do not need to close the previous section as all you have to do is switch from one tab to another (just as in MS Excel). Examples of tabs are shown in the figure.

In order to close a tab you have to go to it and click the cross shown in the figure with a red arrow or double-click the name of the tab, or select the menu option *File → Close Window*.

Some of the buttons on the toolbar may be inactive (displayed in grey), or be missing, depending upon the program component with which you are working at the moment.



There are the following buttons on <u>the toolbar</u>:

- New Record (Creates a new record in all the lists (e.g. a new client, a new option in the guides, etc.));
- Edit (Switches to editing a record selected at the moment);
- Delete (Deletes a selected record);

Attention! Deleted records cannot be undeleted. The system will not permit deletion of records that are used in other elements of the system (e.g. it is not possible to delete a specific service delivery site from the Guide, if it is used in daily control).

- Create Folder (Creates folders, increasing record grouping possibilities);
- Grouping (Switches the folder display mode on and off);
- Move (Moves a record between folders (records can be moved only one by one));
- Directories (To show or edit the Directories (See para. *3.1. Directories*);
- Project Clients (To view and edit project client lists (See *3.2. Project Clients*);
- Daily Recording Sheets (To view and edit the list of daily record forms (See para. *3.3. Daily recording sheets*);
- Training Sessions (To view and edit the list of training sessions / thematic lessons conducted (See *3.4. Training sessions conducted*);
- Export to MS Excel (Exporting window contents to Excel makes it possible to use SyrEx2 data in outside programs);
- Backup Copy (To create a backup copy of the database (See 4.2.1. *Backup copies*);
- Settings (To call a dialog window with program settings (See 5.2. Settings);
- Information (shows information about the program: version of SyrEx2, contact information).

<u>Menu Options</u>

- File
  - Main Window
  - Export →
    - Data Export in CSV Format (this function is intended for additional data analysis with the use of special programs)
  - Transfer to MS Excel
  - Print Settings
  - Close Window
  - Exit the Program
- View
  - Toolbar
  - Status Bar
- Directories
  - Commodities and services
  - Service delivery sites
  - Narcotic substances
  - Package of services
  - Project staff
  - Funding sources
  - Organizations
- Registers
  - Project clients
  - Daily recording sheets
  - Training sessions conducted

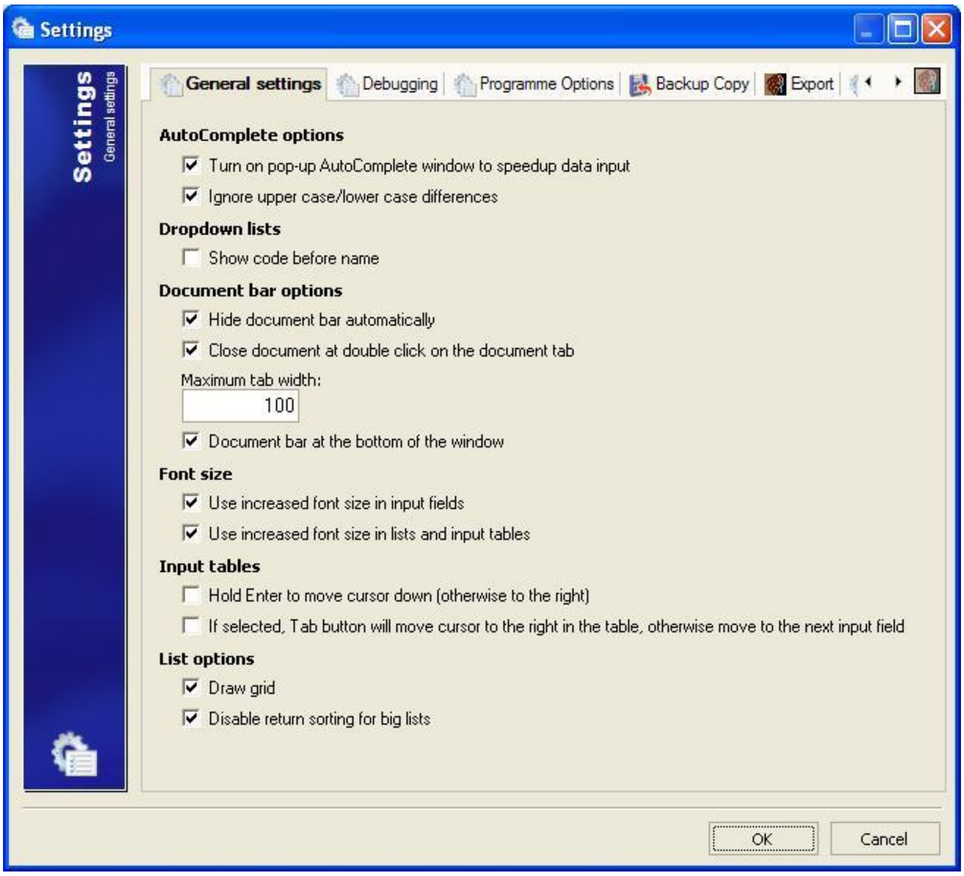
- Reports
  - Report on commodities and services for the period
  - Report on counseling and referrals for the period
  - Report on training sessions conducted
  - Coverage for the period
  - Visits distribution
- Services
  - Data Exchange →
    - Transfer Data
    - Receive Data
    - Comparison of uploaded data
    - Export to dbf format
  - Create backup copy
  - Database Maintenance →
    - Restore from backup copy
    - Database optimization
    - Database testing
  - Registers →
    - Generate template for MS Excel
    - Upload the forms
  - Settings
  - Install configuration
  - Period closure
- Window (Contains window layout options on the SyrEx2 screen and a list of open windows)
- Help
  - About the program.

5.2.Settings

System settings are divided into six sections: *General Settings, Debugging, Settings, Backup Copy, Export, an Organization details*.

- General Settings

It is recommended to leave the default general settings unchanged. If you find a certain functional element of the system inconvenient, you can customize the available options offered on this tab.

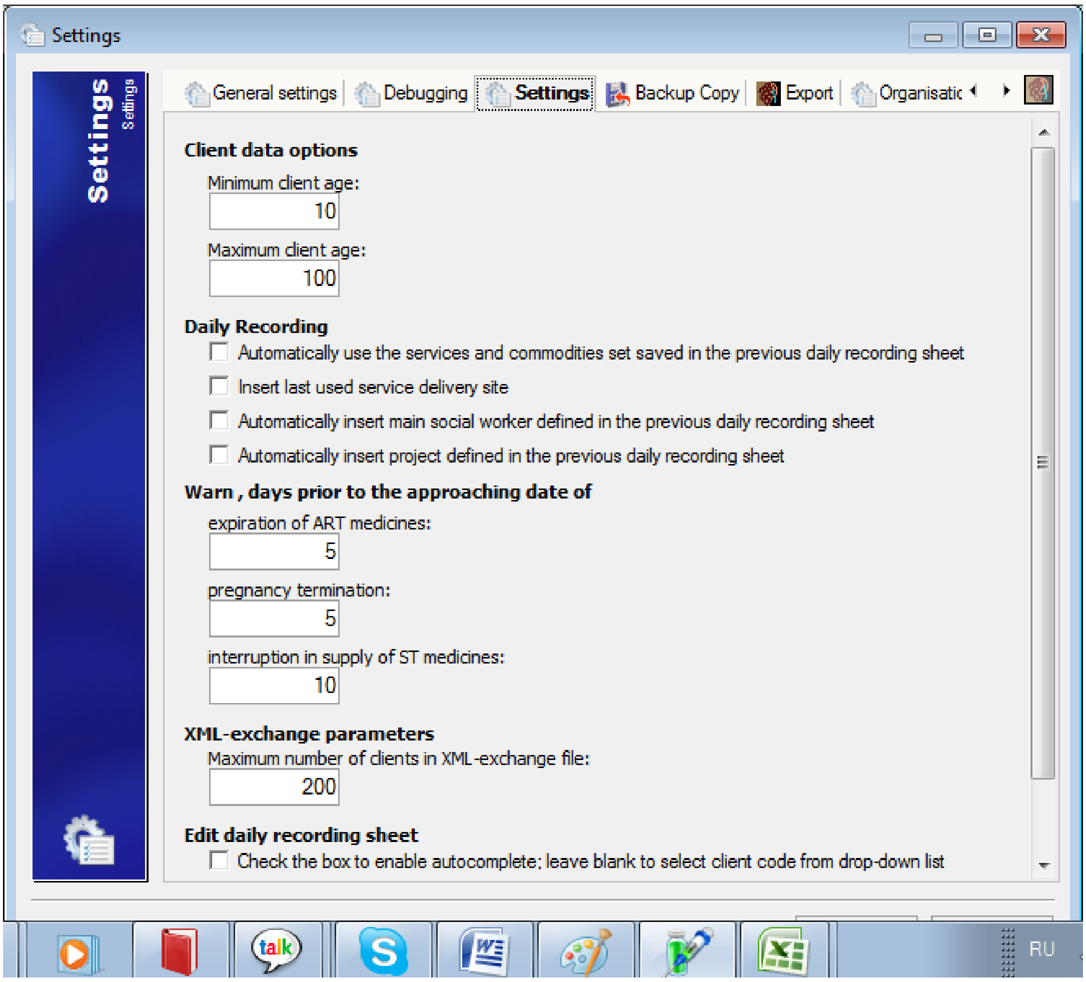


- Debugging

This setup option is technical and intended only for developers.

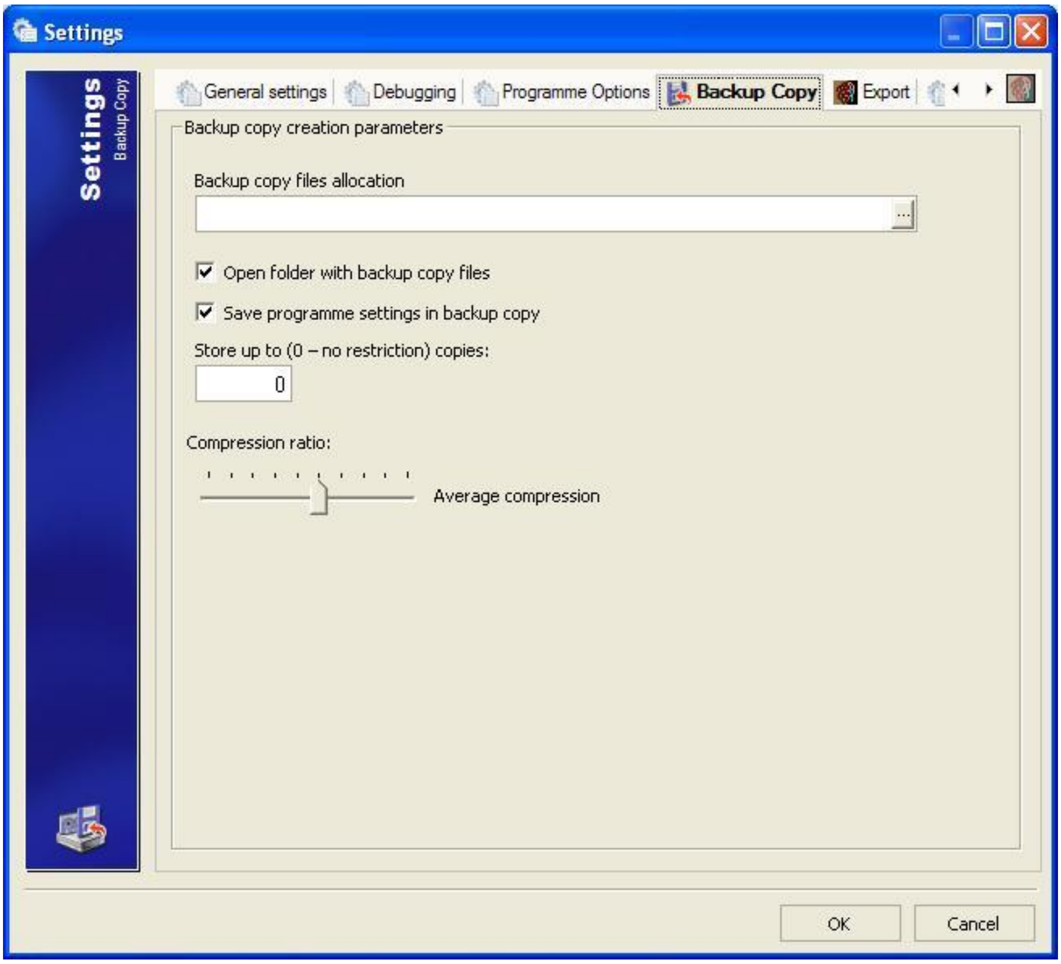
- Settings

You can leave these options as they are by default or you can customize them to suit your convenience. The client's minimum and maximum age settings will determine the permissible age range after which the program will not output an error message.



- Backup Copy

Defines the default path used for creating or uploading backup copies (*.bkz2 files). The default setting is: {My Documents}\www.vasbor.com\sx2malay\Backup. Changing not recommended.



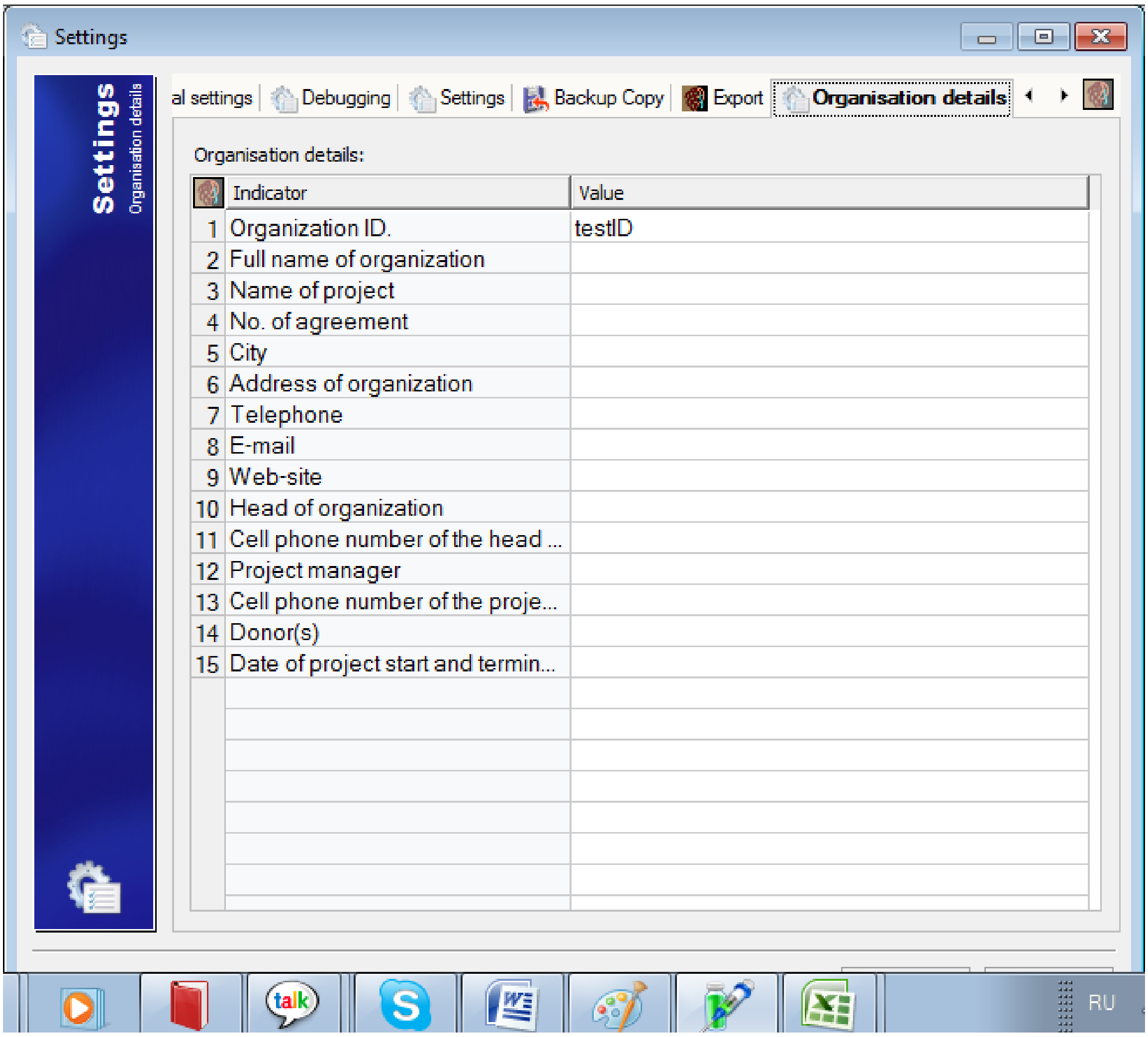
- Export

Defines the default path used for generating data export files (*.upz2 files). The default setting is: {My Documents}\ www.vasbor.com\ sx2malay\ Export. Changing not recommended

- Organization details.

Contains the Organization ID and other parameters[1].

[1] Also see para. 3.1.1. Organization directory.

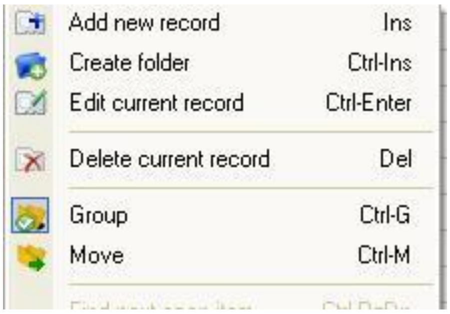


Fill in as many fields in this section as you can. Information from this dialog box will be used for generating reports.

Attention! Errors in completing the “Organization ID” field can cause severe data distortion, affecting the results of other organizations and summary information for all the regions. For this reason, please be extremely careful.

5.3. Hotkeys and Interface Features

- Forms:
  - Fields with a yellow background are required.
  - Fields with a white background can be left blank
  - Fields with a grey or blue background are filled in automatically and cannot be changed manually
- Using the Keyboard
  - Ins – adds a record
  - Ctrl + Ins – creates a folder
  - Del – deletes a record
  - Ctrl + Enter – edits a record
  - Ctrl + G – switches the folder display mode on and off
  - Ctrl + M – moves records between folders
- Using the shortcut menu appearing after clicking the right-hand button



- Using the Mouse
  - A double click opens a record for editing
  - A double click on a white background creates a new record
  - A double click on a tab at the bottom of the screen closes the active window.
- Using the toolbar

- General Options
  - Exit one level up, Esc – to cancel
  - Paste from Buffer – Ctrl+V
  - Copy Into Buffer– Ctrl+C
  - Search, Filter - Ctrl+F
- Fast Switch to the Directories
  - In all fields to be filled in with the help of dropdown lists there is the button that allows you to make a quick jump to the appropriate section of the directories or client list for viewing and editing. The button clears the contents of a field.

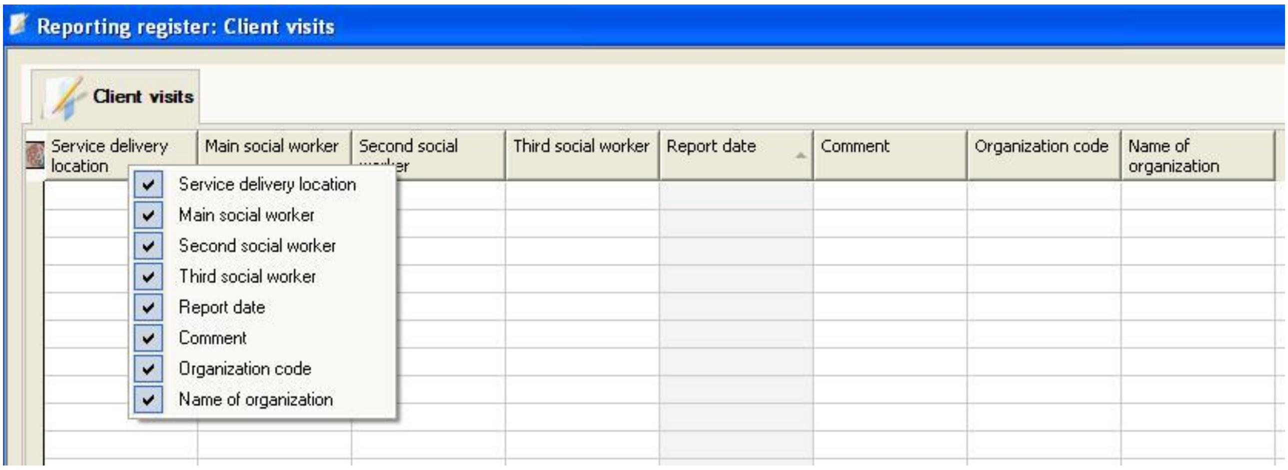
In most cases, SyrEx2 provides pop-up help messages to make interface and functional features easier to understand and to use.

5.4.Using the Lists

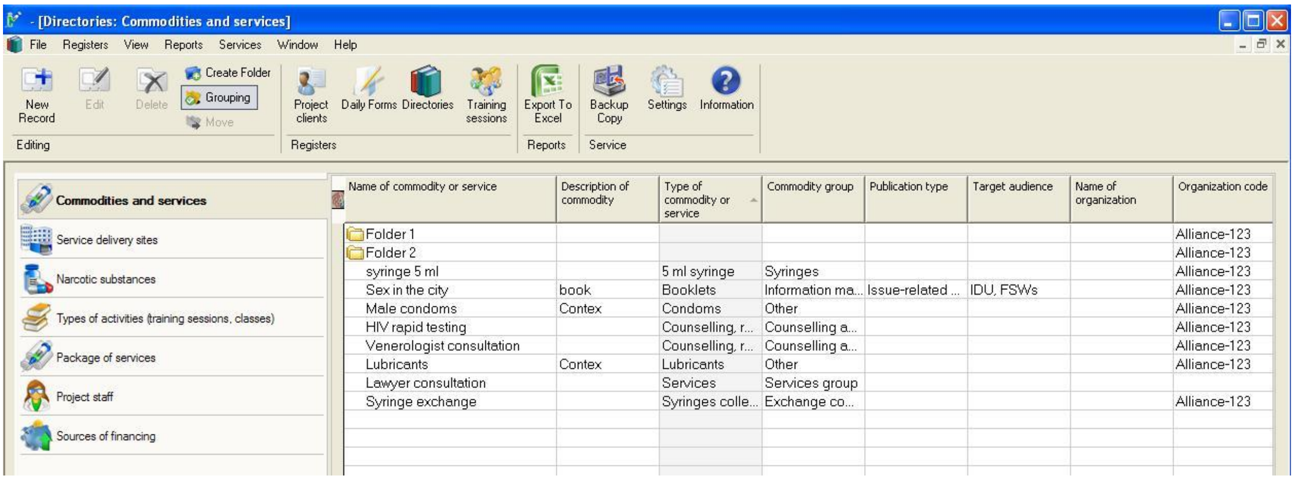
The lists are used in the directories, client register, daily records and training records. The following general rules are applicable to all the lists of SyrEx2:

- All columns are movable in any order (i.e. your own order of columns displayed can be established). In order to do this, you must click on the name of the column with the left-hand button on the mouse and then, keeping the button pressed, drag it to the desired position.
- The width of all columns can be adjusted (similarly to procedures used in MS Excel).
- You can customize the set of fields (columns) displayed in all the lists. In order to do this, you must click on the header of the list with the right-hand mouse button. The fields with a check mark are displayed. If there is no check mark, then the field is hidden.

Example: in this case, all the available fields will be displayed on screen:

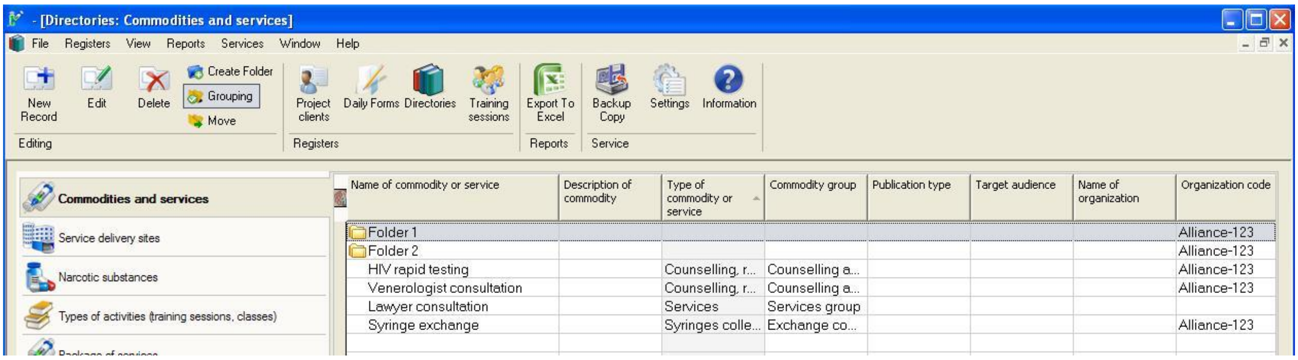


- In all the lists you can sort records by any of the fields displayed. Sorting can be done in ascending or descending order. For this purpose, you need to click on the column title, e.g. click the column title *Year of Birth*. A second click reverses the order of sorting.
- You can create folders to organize lists. For this purpose, you need to click the "Create Folder" button (or use any other means available for this purpose) and enter its name. Entering and exiting a folder is done with a double click on its name.

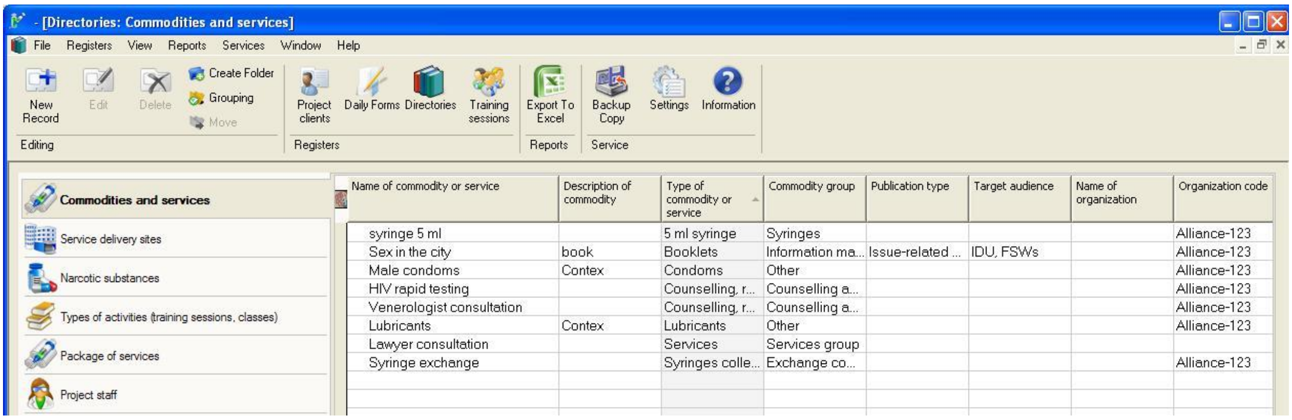


- The folder display mode is switched on and off with the "Group" function. When the "Group" function is enabled, the records located in the folders will be stored inside them. When the "Group" function is disabled, all the records of the list will be displayed together.

Example: the "Group" function is enabled:



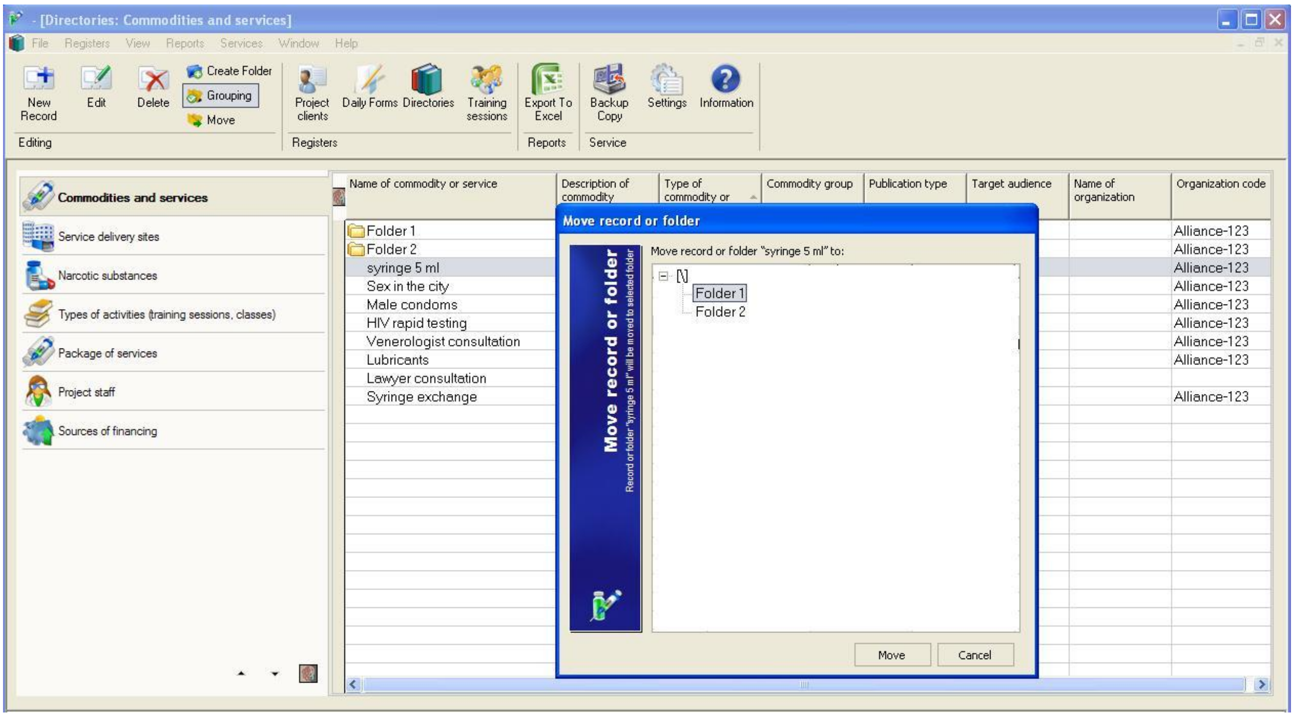
Example: the "Group" function is disabled:



Both screenshots represent the same list.

- The “Move” function allows the user to move records one by one between different folders. For this purpose, you should select a record, hit the “Move” button and specify the target folder.

Example: In this example, the record marked in grey is being moved from Folder 1 into Folder 2.



- In the tables of ***Daily recording sheets you*** can copy and paste, using the ‘Ctrl + C’ key combination to copy and 'Ctrl + V’ – to paste. When a range of cells is selected with the mouse, the copied value can be at once pasted into all the cells of the range.

  In this example, the cell “3” was copied and pasted into two selected cells.
- All the lists and reports can be transferred to MS Excel, using the “Export to Excel” button on the toolbar.

5.5.Important Points To Remember When Using The Directories

Attention! In order to avoid errors and inaccuracies in the reports, it is extremely important that the directories should be completely filled in before starting to make records. In your further work, it is strongly recommended to avoid editing the already existing records in the directory, except when the editing is done to add data to or correct inaccuracies in a record, leaving its substance intact.

Editing procedures can lead to distortion of database information relevant to this section of the directories. **Do not delete and do not update no longer current data in the directories; add a new item instead of editing the existing one.**

Example: Social worker A has changed his/her occupational profile and a new employee B has come to fill this position. If we replace Employee A's particulars in the directories with those of Employee B, then no Employee A's records will remain in the database, and all previous records will show Employee B. In this case, it would be correct to create a new record for B.

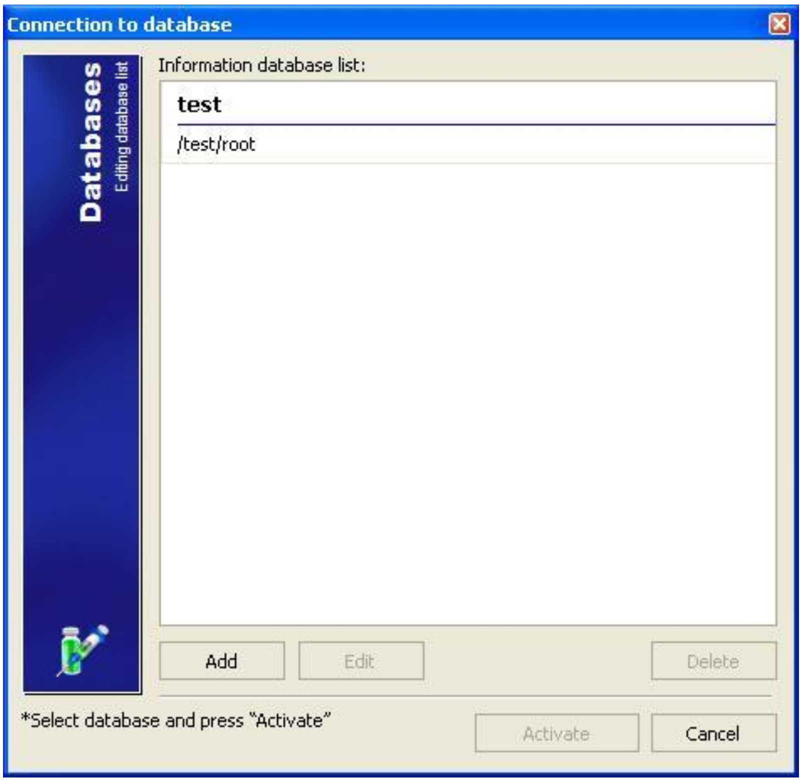
For current records of directories that you don't need any more use the **"Hidden"** function (check mark) available in the directory inside the appropriate record. This rule applies to all the sections of the directories.

6. Technical Information

6.1.Running Several Databases on a Single Computer

SyrEx2 provides the ability to work with several separate databases on one computer. For this purpose, when starting up SyrEx2, click “Ok”.

A window with a list of all databases will appear. By default there is only one database titled ***test.***

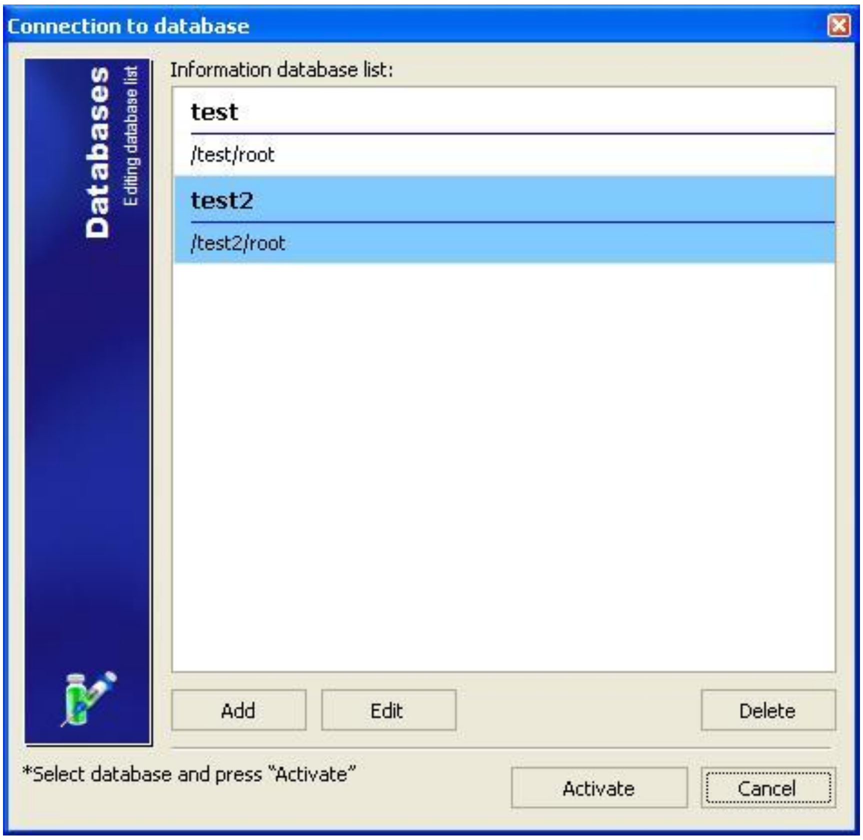


In order to create another one or several databases, please click “Add”:

- Specify the desired database name in the **“Configuration Name”** field, using the Latin alphabet.
- In the **“Server Name”** field enter the name of the server where this database will be stored. If the database is stored locally on the same computer, as specified, this field will remain blank.
- In the **“Database Name”** field enter the same contents as those in the field “Configuration Name”.
- In the “**Default User Name”** field type in the word “**root**”.
- Check-mark “**For All Users”** to make this database available to all Windows users.

Example:

After clicking “OK”, the added database will be shown in the list:



You can select this database and click the **"Activate"** button. In this case, the SyrEx2 system login window will appear and this database will be indicated as the database that will be connected.

As in the case with the *test* database, at the first connection the system will point out that this database does not exist and it should be created. Upon subsequent connections you can simply select a database, clicking "Ok", and then "Activate" after the desired database has been chosen.

6.2. Computer Requirements

- Operating System: Windows XP SP2, Windows Vista, Windows 7, Windows 2008, Windows 2008 R2.
- 100 MB of Free Hard Disk Space (Minimum).
- 512MB of RAM (Minimum) (more if dealing with a large memory base).
- 2GHz Processor and Higher.

SyrEx2 uses MySQL database components in strict compliance with the GNU/GPL license.

6.3. Feedback

In case of any technical problems with SyrEx2, which you cannot solve independently, please feel free to contact the developer at: vasbor@vasbor.com.