PowerPath®
to Education and Employment

PowerPath®

SOFTWARE VERSION 10

QuickStart Guide

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QUICKSTART GUIDE

GETTING STARTED General Information

This QuickStart Guide offers simple instructions about program installation, along with some quick tips for use. This quick read provides instructions for installation, as well as valuable tips for getting started, updating previous software versions, and making the most of the software.

PowerPath is a client-driven relational database system that provides considerable control of client information, including effective individual and administrative report features.

For detailed, step-by-step directions on how to access options, enter information, and print reports, see Part 4 of the PowerPath User's Guide.

GETTING STARTED   Installation Requirements

- **Serial Number:** Be aware that you must have a serial number in order to install PowerPath. The program will not be accessible without this licensing information. The software's serial number should be stored in several places in case you ever need to re-install your PowerPath software.

- **Licensing:** _Currently, only single site licensing is available._ Please contact The TLP Group to discuss other site licensing options and multiple purchase discounts.

- **Network Warning:** _This software version is not certified for use on a network._ Attempting to use PowerPath on a network is a violation of the PowerPath software warranty and license agreement. Using it on a network may also damage files in the PowerPath program and may result in lost client data. (A networked printer is OK.)

- **Preferred System Requirements:**
    - Windows XP SP2 or later (limited support for Vista)
    - 1 Gig RAM
    - 500 MB free hard disk space
    - Pentium IV or greater processor
    - Monitor display resolution of at least 1024x768 pixels -- Monitors with lower resolution will not properly display the PowerPath software.

GETTING STARTED Installation Basics

- *Remember, this software should not be installed on a network.* (A networked printer is OK.) Each PowerPath program must be installed directly on the hard drive of the computer where it will be used.

- Be sure to close all Windows applications prior to installation.

- Installing your new software is very easy. Simply insert the disk and follow the on-screen instructions.

- You may sometimes update your software with a link in an email. NOTE: While most users will be able to download directly from the link itself, adjustments may need to be made depending on your internet provider. If you experience a browser-based problem, please check with your IT professional for assistance.

- A box reading Install Shield Wizard will appear. If it doesn't show, click on the "My Computer" icon and select the CD drive icon.

- You will need your serial number to install. The program will not be accessible without this licensing information. The software's serial number should be stored in several places in case you ever need to re-install your PowerPath software. It can be found on the CD case and on the licensing envelope.

- You will be asked to accept the warranty and licensing agreement. Please select "Accept" and "Continue" to proceed.

- When installation is complete, a PowerPath icon will appear on your desktop. Click on the icon to open the program.

INSTALLATION New Programs/Sites

- When you open your new PowerPath software for the first time after installation, you will be asked to enter some basic information about your program and desired sites/groups.

- Enter the name and address of your organization where indicated. *Your organization's name and address will appear on all reports.*

- Enter your organization's Service Sites or Client Groups. Additional sites/groups can be added at any time by selecting "Maintain Service Sites/Groups" from the Tools menu or by clicking the Sites/Groups button on the first tab of the Personal Profile intake information.

INSTALLATION Existing Programs/Sites

- *Be sure to back up your existing client data before installation.* The Utilities menu in older versions provides a feature for making a PowerPath Data Backup. This is a precaution so that data are secure for the transfer. PowerPath cannot be held responsible for loss of information.

- Installing your new software is very easy. Simply insert the disk and follow the on-screen instructions. You will need your serial number to install.

- When updating to a new version of PowerPath software, you will be asked to convert your existing data. *The new software will automatically overwrite your current software and preserve your existing client information.* (There is no need to install it as a separate program.) Your settings will also be preserved.

- When this transfer is complete, the program will run a Participant Exception Report. This report will notify you of any required information that may be missing. Some records may need to be edited as the database files may have changed. This information must be added/corrected before administrative reports will print properly.

QUICK TIPS   Check out these new features!

SET UP

- Can now choose any printer, including networked printers

DATA ENTRY

- Easier, client-driven flow with no more ins and outs
- Tool bars for easy access to main options
- Allows data tracking for youth under age 16

PERSONAL PROFILE INFORMATION

- Fewer required data fields
- Required fields and tabs are shown in red for easy recognition

SCREENING INFORMATION

- Ranges for responses shown for each screening question
- Clear messages for identifying missing required screening data

PRINTING REPORTS

- Updated report formats, including check boxes for easy Adaptation and Strategy selection
- Faster printing of multiple reports
- PDFs available on all reports for previewing, saving, and/or sharing (Adobe Acrobat Reader is included as part of the PowerPath software)
- Service Summary now automatically searches for missing required information when building the report
- Undo and rebuild options for reports available by section or all sections at once

ENHANCED ADMINISTRATIVE REPORTS

- A List of Clients Report can now be generated using all clients, only active clients or only inactive clients.
- A new report, the Client Data Entered Report, offers a listing of all clients in the system, their Service Site/Group, screening data entered, and whether Exit Data has been entered. This report can help with identifying missing data.
- The List of Service Sites includes Service Site/Group information This report will show whether a site has been imported. If it is imported, the report will list the date of the last import, If site was exported, it will show the date of the last export. The report also lists the number of clients in each Site/Group, and total number of clients in each Site/Group.

DATA FLEXIBILITY AND MOBILITY

- Export/Import Client Data for Aggregating Data for creating a combined Service Summary Report or to move client information from one PC to another
  - > Site/Group or Client information can be transferred from one PC to another using the Incorporate Data feature on the Tools menu. (Both computers must be using the current software version.)

    REMEMBER: Site/Group names must be different on each PC, so that the data that is being transferred from one PC to another does not over-write existing data.
  - > Multiple external site data can be transferred and combined into a "main" or "primary" data base.
  - > The Potentially Duplicated Participants report is available to check for possible duplicate records found when incorporating client information into another database.
- All reports are available in PDF form for saving and sharing.

QUICK TIPS Check out these shortcuts!

- **Tool Bars**: In addition to the menus accessible at the top of the screen, there are now two tool bars:

  1. Upper Tool Bar - This tool bar is at the top of the home screen. It includes icons for the four main areas -- **Clients, Reports, Service Sites/ Groups** and the **Service Summary** (aggregate Administrative Report).

  2. Lower Tool Bar - This tool bar is located at the bottom of an open **PowerPath** window. It includes icons for adding **New** clients, **Deleting** clients, accessing **Profile** information, entering data for **Basic** screenings, **AC** (Attention Challenges), **VSS** (Visual Stress Syndrome), **V & A** (Visual and Auditory Functions), **Extended** (Screening data), **Exit Data**, and **Reports**.

- **Rollovers**: Use your mouse to guide your curser to 'roll over' text and buttons. When you roll over the text or button options, additional information or instructions will appear.

DATA ENTRY SHORTCUTS

- **Tabbing:** Use tab key to move through data entry fields.

- **First Letter for Pick List:** When trying to locate an existing client, use your cursor select any client in from pick list window. Entering the first letter of the last name of the client you are searching for will move your selection to the first last name beginning with that letter.

- **Active vs. Inactive Clients:** May now categorize clients as Active or. Inactive to simplify Client pick list. If a client is marked as inactive, their information can still be accessed by selecting 'Show Inactive Clients' from the pick list.

- **Intake Date:** Intake date defaults to the current date.

- **Zip Code:** When entering address information, entering zip code will automatically populate the city and state fields.

- **First Letter for Screening Responses:** Entering first letter activates drop down choices beginning with that letter for quick data entry (if applicable).

- **Screening Response Ranges:** Ranges for all screening responses are now shown for each screening question. You will be prompted to enter any missing information upon saving.

- **"Never" Screening Results:** AC and VSS data entry tabs have a new "Never" shortcut. Hover the cursor over the "Never" response and choose to set all responses on current tab as "Never."

REPORT SHORTCUTS

- **Profile Information:** Now included in reports only if selected.

- **Report Selection:** Information included in reports is now automatically determined by screening information entered.

- **Service Summary Start Date:** Service Summary start date now defaults to earliest intake date of client data entered.