

# Submission Instructions for EOY 2009

## 1. How/Where to download the latest version of the Spectrum Status Report Software

Visit our website [www.spectrumlihtc.com](http://www.spectrumlihtc.com). Click on your state. Scroll down to EOY 2009 and click on the link *Spectrum Status Report Software XML - Updated October 2009*. This will automatically pop up a download dialog box. Save the file to your desktop for easy access.

A file called *Spectrum Status Report XML 2009 (v3.1.0) FULL Install.exe* will be created on your desktop. Close all other applications first and then open the downloaded file. The setup program will walk you through the installation process.

## 2. Overview of the new *Spectrum Status Report XML 2009* software

While the new Spectrum Status Report XML software remains essentially the same as previous versions, it incorporates three new features:

- New Tenant Demographic and Subsidy Type data
- The ability to import XML data from Management Software
- The ability to send the EOY database directly to Spectrum over the internet

### 2.1a - New Tenant Demographic data

- Gender
- Ethnicity
- Race
- Marital Status
- Disabled

### 2.1b -New Subsidy Type data

- Unit Type (Low Income, Market Unit, Unknown) **Required to be entered**
- Subsidy Type (Section-8 Project Based, Section-8 Voucher, Rural Housing Service and Other Assistance)
- Home Status (Home High and Home Low) (Not applicable in all states)

**NOTE:** The *Demographic* and *Subsidy Type* information is not specifically required (except Unit Type) to be entered before the event can be saved. However, it is important to keep in mind that the state you are reporting to may require that some or all of the demographic information be reported. If the state requires it then Spectrum will need the information as well. If you don't provide it here, you will have to provide it at a later date.

## **2.2 - The ability to import XML data from Management Software**

The new Spectrum Status Report XML software adheres to the *State Housing Finance Agency (HFA) Low Income Housing Tax Credit (LIHTC) Data Transfer Standard* as posted on the *Multifamily Information and Transactions Standard (MITS)* website (<http://www.mitsproject.com/>).

Data that has been entered into property/asset management and related types of software applications (Yardi, Real Page, Boston Post, etc.) that support the *LIHTC Data Transfer Standard* can be imported directly into the Spectrum database eliminating the need to re-enter unit event data.

**NOTE:** One thing to keep in mind is that the *LIHTC Data Standard* **does not include** important unit data that you are required to submit to Spectrum as part of your compliance review. *Number of Bedrooms* and *Square Footage* for each unit aren't part of the standard and consequently aren't included in the data transfer process.

Spectrum does have a special ancillary process that can be implemented to transfer the *Number of Bedrooms* and *Square Footage* data, but will require working with your existing management software vendor. Please contact Spectrum technical support at 517-669-2054 for information.

## **2.3 - The ability to send the EOY database directly to Spectrum over the internet**

You can now send your Spectrum EOY database directly to Spectrum via the internet without having to use eMail or know the exact location of the file on your computer. A FTP (File Transfer Protocol) client has been embedded in the new software that will transfer the Report file directly to Spectrum as long as the computer you're using is connected to the internet.

To send the data directly to Spectrum, make sure you have a working internet connection and the report file you want to send is currently open. Then go to the *File* menu at the top of the screen and select "*Send Report File to Spectrum*". In the "*Not Connected to Spectrum*" window select "*Send File to Spectrum*" to connect and send the report file.

Once the transfer process is complete, an eMail message will automatically be created that will indicate what the name of the file was (including the date sent) and what properties were included in it. You can add additional information to the eMail if you need to.

**IMPORTANT:** You will need to manually select the *Send* command in your eMail program to actually send the file to Spectrum.

**NOTE:** The report file is not attached to the eMail because it has already been sent to Spectrum. The purpose of the eMail is simply to notify Spectrum that the file was sent.

A "*Spectrum Transfer File Log*" window will also open to show you details about the file that was sent.

### **3. Creating a new Database**

Only create a new report file if the property is new, i.e. recently placed in service. If you are creating a report file for the first time the “*Status Report File Setup – CREATE a New Report File*” window will open the first time you open the Spectrum Status Report Software. If the software has been used or opened before there may be a *Could Not Find File* error. That is normal. It means a file hasn’t been created or linked to yet.

To create a new file, click ‘OK’ and then go to the *File* menu at the top of the main screen and select “*Open Report File*” and then select “*Create a New File Report*”. Create a file name that references the property(s) being report and that you will remember. The new file will be automatically saved in the Spectrum program folder (C:\Program Files\Spectrum Status Report 2009). Select “OK” to create the new report

Start generating the new report by entering in all of your property information, followed by the building and unit information. Try the *Help* button first if you have questions.

### **4. Updating an Existing Database (Created Prior to 2009)**

If you have a report file that was created in a version of the software prior to XML 2009 and want to continue to use that file, the newer version (Spectrum XML 2009) will update the report. In most cases the earlier version of the report file will be automatically located and converted the first time the new XML 2009 version is opened.

If the previous report file is not in the expected location (C:\Program Files\Spectrum Status Report 2002) then a standard “*Open File*” dialog box will open and you can locate the file with that.

If you use more than one report file and need to update multiple files then go to the *File* menu at the top of the main screen and select “*Open Report File*” and then select “*Upgrade an Existing Report File*” for each of the report files you need to update. Follow the instructions in the “*Status Report File Setup – UPGRADE an Existing Report File*” window.

### **5. Importing XML Data From a Different Software Application**

There is a two step process to import (bring in) XML data from another software program into the Spectrum XML 2009 software.

1. The data must first be exported (sent out) of the management software.
2. The data is then imported (brought into) the Spectrum software.

If you are using a property management software application that supports XML data transfer you’ll need to contract that software provider for instructions on how to export data from the management system. The management software will export the XML data to a single file that is saved to your computer’s hard drive. The management software provider will provide the information about the file name and its location.

Once the XML data has been exported to a file, the Spectrum XML 2009 software will then import it into either a new report file or a previous report file you’ve been using.

To import XML data into a Spectrum report file go to the *File* menu at the top of the main screen and select “*Import XML Data*” and then select either “*Import XML Into a New File*” or “*Import XML Into an Existing Report File*”.

See our website for more detailed information on how to import XML data.

## **6. How to find the Report file on your Computer to update or manually send to Spectrum**

If you are having trouble locating a previously created report file that you want to either continue to use or send directly to Spectrum, there are several methods you can use to locate the report file. You are looking for a *Microsoft Access database file* with the name you gave it when it was originally created.

Depending on how your computer is configured you may be able to see the three letter file extension **.mdb** that’s at the end of the file name that indicates an Access file. If you have Access installed on your computer the file will look like a document with a red or yellow key icon. If your computer is not setup to show the three letter **.mdb** file extension or you don’t have Access installed on your computer you’ll have to rely on recognizing the name of the file.

Once you have downloaded and installed the latest version (XML 2009) of the Spectrum Status Report Software on your computer start the new version up. If it cannot automatically locate and update an earlier version of the report using the software or you can’t find the file when doing a computer search you may need to call Spectrum to receive the file previously submitted.

**If you have the Spectrum Status Report XML 2009 software open, and all the correct property information is there, select *Help* then *About* from the menu at the top of the screen. In the “*Status Report File Name and Location*” box you’ll see the location and name of the file you need to send. Close the software, locate the file and email it when you are ready to submit the report.**

If you cannot find your file through the *Help/About* method the first place to look is the Spectrum default program folder. Select *My Computer/Local Disk C:/Program Files/Spectrum Status Report XML 2009* (or *My Computer/Local Disk C:/Program Files/Spectrum Status Report 2002 for earlier version*).

Look for **.mdb** files as mentioned above. A good way to double check if you have found the correct file is to look at the modified date. The most recent date is probably the correct file.

If the file is not saved in the default folder try doing a general search. This is a great way of finding files. Select your *Start* button then select *Search* or *Find Files or Folders*. Make sure you are searching on your C: Drive. In the search field type in **\*.mdb**. The **\*** is a wild card created by typing shift 8. Select *Search*. Look for relevant file names such as property names or management companies.

Once you have found the correct file write down the location of that file or make a copy and put it on your desktop so that you can easily locate it. This will be the file you need to send/update and send for EOY 2009.

## **7. How to send a Report File Manually** (*Please do not do this unless you have spoken with Deb Bassett 207-767-8000 x214*)

If you are not able to directly transfer your report file to Spectrum (see section 2.3 above) you can eMail the report database file to [info@spectrumlihtc.com](mailto:info@spectrumlihtc.com). As our email server often rejects large files and databases please “zip” the file prior to emailing. You may need a copy of WinZip to compress the file. You can download this free program from [www.winzip.com](http://www.winzip.com). Unfortunately Spectrum cannot offer any technical support or help using WinZip. If you send via disk you MUST send it in a protected case.

## **8. How/Where to download the Owner Certificate of Continuing Program Compliance:**

Visit our website [www.spectrumlihtc.com](http://www.spectrumlihtc.com) and select your state from the left side bar. Scroll down to EOY 2009, and click the “download Owner Certificate Here” link. You can choose to download it in either Word or PDF format. Please be sure to have it signed and notarized before mailing. Faxed or Emailed copies will not be accepted.

## **9. Submitting your database to Spectrum:**

To send the data directly to Spectrum, make sure you have a working internet connection and the report file you want to send is currently open. Then go to the *File* menu at the top of the screen and select “*Send Report File to Spectrum*”. In the “*Not Connected to Spectrum*” window select “*Send File to Spectrum*” to connect and send the report file.

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