Completing the Wisconsin Public Library Annual Report Using LibPas Online

Changes for the 2011 Online Report Form (for 2011 data entered in early 2012)

More pre-filled fields: In response to user requests, we have customized the online form to pre-fill more data fields that are less likely to change year-to-year, such as library board members, staff positions, and counties that provide reimbursement. Be sure to change information as appropriate.

Repeating Rows: In order to make navigating the online form easier, some sections now incorporate the ability to add new rows for data input only as required. Those sections will include lines for last year's responses and a blank line. Once you type in the blank line, another new blank line will become available for possible input.

As before, no special software is required on your computer, and the forms should work with any recent Web browser, including Firefox, Safari, Chrome, and Opera, as well as Internet Explorer (version 7 and newer), with CSS, images, and JavaScript options enabled, as is typical.

Steps to Completing Your Annual Report

Completing the report involves several steps, only one of which is entering the data online. The steps include:

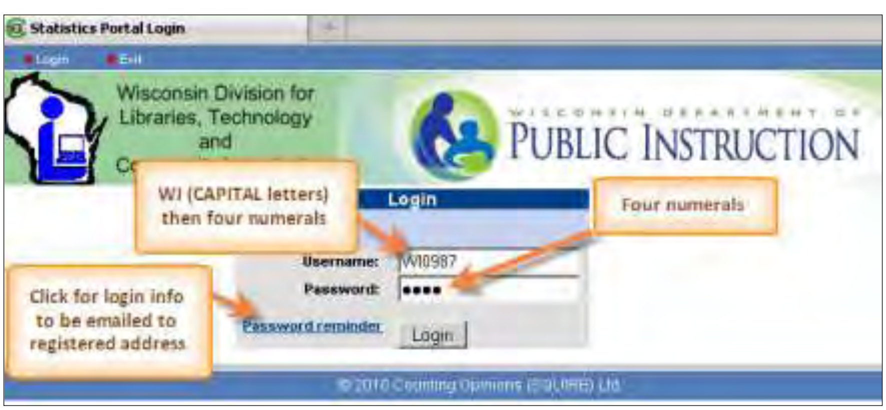
1. Collect financial, service, and staff information required to complete the annual report. You do not need to wait for your municipality's audit to complete the report (which must be filed by March 1)—you should know what you spent during the year on materials, operations, and personnel. It is important to be accurate in reporting the revenue received from your municipality, the county, adjacent counties, as well as state and federal funds received. It is also crucial that your expenditures accurately reflect your spending during the reporting year, since county reimbursements you receive are based on annual report data. It is also critical that your loans to resident and non-resident borrowers be recorded and reported accurately, and that you save documents used to arrive at the figures in case your reimbursement requests are questioned. If you are part of a regional shared library automation system, your system should supply you with relevant data or instructions on how to generate necessary reports.
2. Check the DPI website, http://dpi.wi.gov/pld/annrpt.html, for information and resources. Review the Instructions for the Annual Report for definitions as well as any information supplied by your system. Use the blank facsimile form to organize your data for entry.
3. Enter the data on the site as required (see below), print out drafts as necessary, and review the data entered. When you are comfortable that the data is entered properly, ask your library system to review your form (your system may ask you to lock your data first, but we suggest that their review be conducted before the report is locked, printed, and submitted to the board).
4. If your library has more than one service location (branches or bookmobiles) you will now be able to enter data for those branches on the main Annual Report form, instead of opening a separate Outlet form.

5. Lock the data. Let your system know that you have completed the report so that they may review it. After reviewing, you or the system will "Approve" the form, which submits the data to DPI. The "Approve" button should be clicked when the annual report data has been reviewed by the system and approved by the library board. Check with your system to see if they prefer to conduct the "Approve" step.
6. Submit 2 signed copies of the completed annual report to your library system; one of which will be forwarded to DPI. You are also required to submit one copy to your municipality (joint libraries should submit copies to all municipalities). Your library board may wish to use this as an opportunity to give a "state of the library" report to your municipal body.

Getting Started

The library director will receive an email from DPI via the vendor announcing when the form is ready to use, and the message will include the link to access the site, http://wi.countingopinions.com, as well as the *username* and *password* to be used. Bookmark the site so that you can return to it in the future. If you misplace the username and password, you can click on "Password reminder," enter the email address for your account, and your login and password will be sent to you.

The Welcome page contains updates and announcements, as well as links to resources (such as this document, a worksheet copy of the annual report, and a document listing the definitions for data elements). After reviewing the Welcome page, click "Login" and enter your Username and Password.

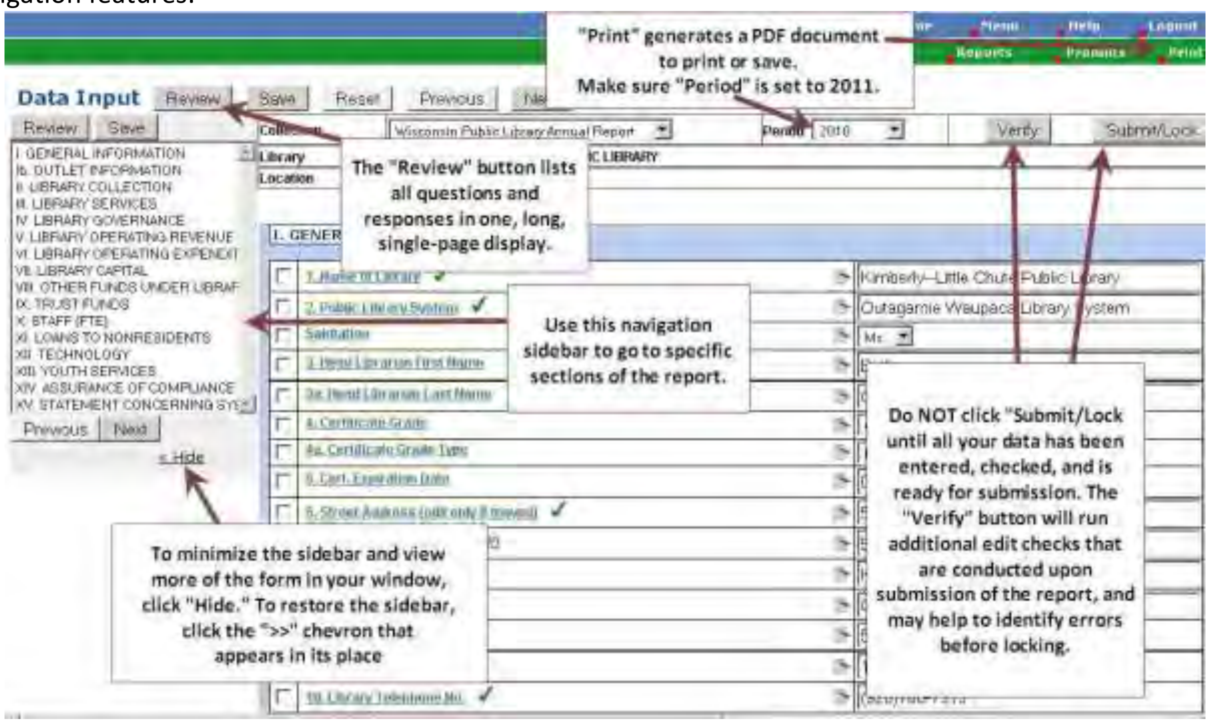


Please note that the Username begins with the abbreviation for Wisconsin (WI—not W1), followed by four numerals (including zeros—not capital Os).

After login, you will be taken to the Wisconsin "Member" screen, which provides links to the Data Input and Reports options, and provides updates or timely information on completing the annual report. After reviewing the Portal screen, select "Library Data," after which you should be directed automatically to the data entry screen for your library. Some libraries, particularly those with branches or bookmobiles, may need to use the Collection pull-down menu on the Data Input screen to select "*Wisconsin Public Library Annual Report*."

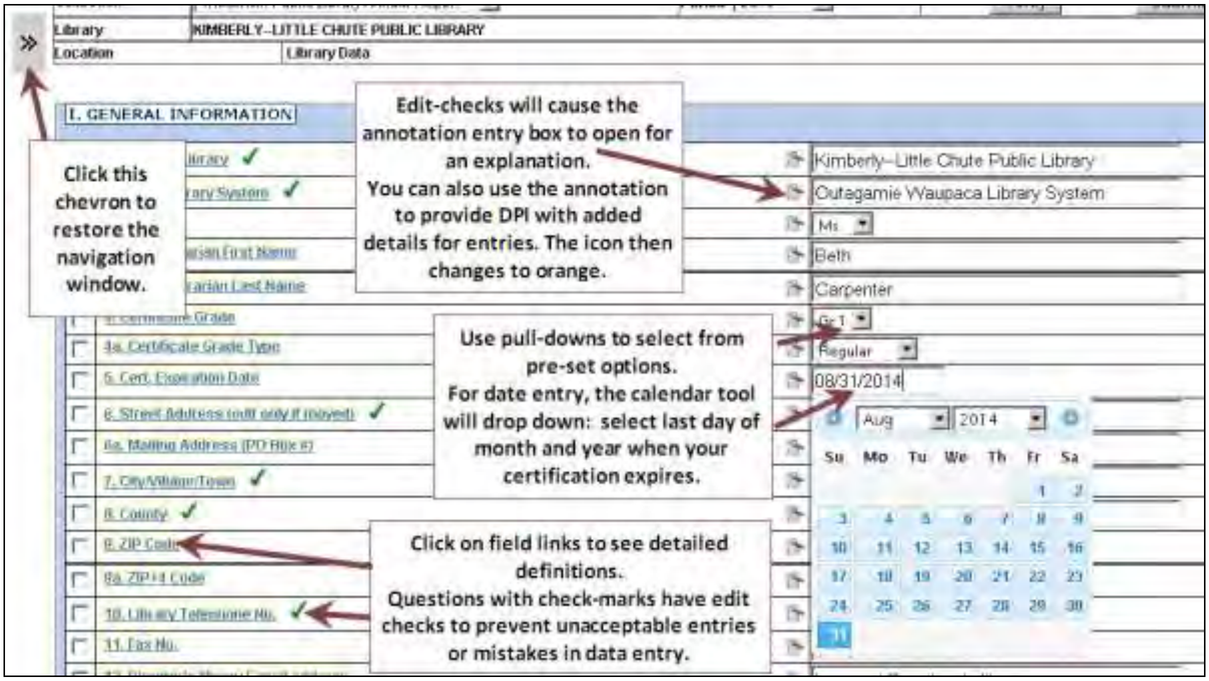
Navigating the Form

In most cases, after logging in you will be presented with a screen similar to the one below, showing the statistical data collection for your library for the reporting period (if not, click "menu," select "data input," then set the "Collection" to "Wisconsin Public Library Statistics"), and check that the "Period" is set to 2011). Before entering data, review the two screen shots below to familiarize yourself with navigation features:

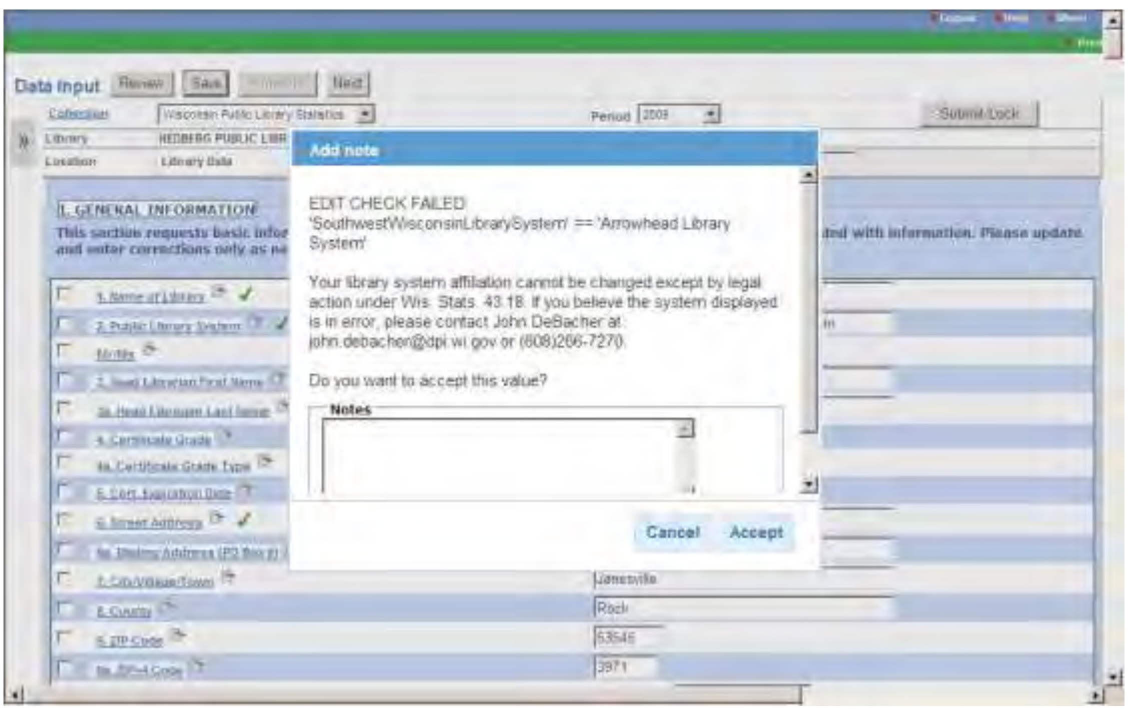


The new forms site has features to navigate and complete the form. Data is stored as entered, and permanently retained when you click "save." Any entries you have made since the last "Save" can be cleared with the "Reset" button (not shown).

The Navigation Sidebar allows you to go to and work on individual sections. You do not have to complete the sections chronologically, nor do you need to complete individual sections before moving on to other sections. Note that there are empty "check boxes" to the left of most field names. These are entirely for your use and do not affect the completion of the forms. You can use them to keep track of questions you want to revisit or questions you have completed, or you can ignore them entirely.



This screen shot shows features of the data entry screen for statistical data, as well as explanations of the icons and data entry points.



This screen demonstrates an edit-check exception. In this case, the user tried to change the library system in which the library is located. The edit check prevents inadvertent changes in typically-fixed information and entries that are outside typical ranges. Please correct the entry or explain the variance.

Data Input

Each User Account has a scope of access that determines the Collection(s) and Location(s) available for data input. Each Collection has an associated data input form, enabling users to input data for each reporting period. Each of these steps is optional.

Step One:

Select the appropriate Collection form. This step is only necessary when there is more than one Collection form. ***Note:*** *Most Wisconsin Public Libraries will see only the* Wisconsin Public Library Annual Report *collection. Only libraries with multiple outlets (branches) will have the option of viewing the* Wisconsin Public Library Outlet Data *collection for their branches. But those libraries can now enter all necessary information on the main* Annual Report *form.*

Step Two:

Once a Collection form is selected, the user must next select the appropriate reporting Period. In most instances the latest collection period is selected by default. ***Note:*** *Be sure the collection period is set to 2011.*

Navigating the Data Input Form

Most Collection Forms are divided into sections. Typically, there are three ways to navigate through the Data Input form.

- Select the name of the section from the list down the left side of the screen. You can "hide" that list by clicking on the "Hide" link. To restore the section navigation box, click the >> chevron symbol.
- Use the Next and Previous buttons to proceed through the form, once section at a time.
- Select the Review button. This displays the entire form on one webpage. This is the same as the initial view when you first load a Data Input form.

You can proceed through each field on the Data Input form by selecting the target field using your mouse, or by using the Tab and/or Enter key to proceed through fields one at a time. To see details for any item in the form, select the Name of the Data Input field to reveal more information.

Entering Data

The Data Input forms support many features for ensuring the quality and integrity of the data. Not all entries incorporate these features so you may or may not encounter the following:

- Edit Checks - that typically check to ensure that entered values are within an acceptable range; otherwise, the user will be prompted to provide a detailed explanation.
- Field length limits - ensuring values contain at least the minimum and no more than the maximum number of characters specified.
- Select lists – that present a limited set of valid values in a pull-down selection for the user's choice.
- Pre-filled values - Data Input fields may already contain data, especially when data for previous Periods is available and the data often does not change from period-to-period.
- Previous Period values - typically displayed to the right of the data input field.

Adding Notes to Definitions

By selecting the Name of any item, you can view more information about the data input field, including a complete definition for the value and other details. Users can enter Notes that are used to assist with understanding or localizing the definitions provided. For example, these Notes might explain where the values are locally sourced, who can provide the data, or anything else that would assist users involved in approving data sets or entering data in subsequent periods. You can record as many Notes as required. Each Note is date- and time-stamped for ease of reference.

Adding Annotations to Explain Data

Using the Annotations icon ( ), explanations can be added for Data values and are required when your response invokes an Edit Check (the value is outside an acceptable range, or information that typically doesn’t change, such as library address, is altered). Explanatory Annotations are designed to help people understand and interpret the data and should be used whenever the data is anomalous or abnormal. For instance, when the data represents a significant change from the values previously reported there is typically one or more reasons. Providing explanations is useful to those responsible for approving or vetting the data submitted and also for those that might later reject or discount the results without a plausible explanation.

Locking and Approving Data

Users should use the Lock button to signify when the Data Input process is complete. Depending on the assigned roles, Users may be able to use the Approve button to signify when the data for the selected Period has been checked and validated by the submitting Location (most often in Wisconsin, the library system will Approve the report after the library director has Locked it). Once Locked, only Data Approvers can Unlock a data set, thus enabling changes to the Data for the Period. Once Approved, users at the submitting Location can no longer Unlock or modify any data for that Period. If a change is required, only the Collection Manager can Unlock the data to make changes or enable the submitting Location to modify its data. If you need your approved form unlocked, contact your system and they will request that the form be unlocked, or send an email to your system and libraryreport@dpi.wi.gov.