

Creating Comparison Reports and Charts Using LibPAS Report Templates

1. From the [Annual Report welcome page](#), click the [Login](#) link. Enter the **username** assigned to your library (capital letters WI, followed by four digits), and the **password**. If you've forgotten the username/password for your library, you can click on [password reminder](#) and enter the library director's email address. The username/password will be emailed to the address registered with the account. If the director has changed since the last annual report, please email LibraryReport@dpi.wi.gov.
2. After logging in, you should see a screen similar to the one below. Click the "Library Reports" link or button.

The screenshot shows the LibPAS web application interface. At the top, there is a navigation bar with links for Reports, Data Input, Home, Menu, Logout, Profile, Libraries, Locations, and Maps. Below the navigation bar, the DLT (Division for Libraries & Technology) logo and the Wisconsin Department of Public Instruction logo are displayed. The main heading is "Milwaukee Public Library". A text box contains the instruction: "Click **Data Entry** to enter data or generate your annual report. Annual reports for previous years can be viewed and printed." Below this, there is a link to support material: "Support material is available on [the Public Library Development \(PLD\) annual report webpage](#), including the following:" followed by three bullet points: "Data entry worksheet of all Annual Report data elements", "Instructions and definitions for Annual Report data elements", and "Instructions for using this LibPAS online reporting system". A contact information section follows: "If you have questions that are not addressed in the resources above, contact your [regional public library system](#), email LibraryReport@dpi.wi.gov, or call Michael Dennison at (608) 266-5196." The section "Report Templates for Library Comparisons" explains that public libraries can use several report templates to compare their library with other Wisconsin libraries. A red box highlights a button labeled "Library Reports" with the text "To access report templates, continue to" next to it. The footer contains the copyright notice: "© 2019 Counting Opinions (SQUIRE) Ltd."

3. You should now see the "Manage Reports" screen. If the "Report Templates" tab is not already selected, click the tab to select it.

The screenshot shows the "Manage Reports" screen. At the top, there is a navigation bar with links for Home, Menu, Help, Logout, Data Input, Library Trend, and Ranking Report. The main heading is "Manage Reports". Below the heading, there is a text box with instructions: "To generate a report, select an existing report by *Name* (below) or use the [Library Trend](#) and/or [Ranking Report](#) links from the navigation bar (above). Use the **Add** button to *Create* a new report in a *Local* folder. To Move or Remove one or more reports, select the report(s) (use the checkbox in the first column) and ... Use the **Remove** button to *remove* the report(s) that you previously created. Use the **Move** button to *move* the report(s) to another local folder that you previously created. **Published Reports** (see below) are available to *share* with anyone, using the associated URL." Below the text, there is a tabbed interface with four tabs: "Local", "WI", "IFLA", and "PLA". Under the "Local" tab, there is a sub-tabbed interface with four tabs: "Report", "Report Templates", "Published Reports", and "+". A red arrow points to the "Report Templates" tab, and a text box next to it says "Click to select the Report Templates tab".

- Eight of the reports are custom-designed templates that may be useful for library planning and budgeting. The templates can generate reports that bracket your library with other Wisconsin libraries within a 10% range, and display results either in a table or a series of graphs. To try one of the reports, click the link for “10% range of municipal population—comparisons” in the Report Name column, as indicated below:

Manage Reports

To generate a report, select an existing report by *Name* (below) or use the *Library Trend* and/or *Ranking Report* links from the navigation bar (above). Use the **Add** button to *Create* a new report in a *Local* folder. To *Move* or *Remove* one or more reports, select the report(s) (use the checkbox in the first column) and ... Use the **Remove** button to *remove* the report(s) that you previously created. Use the **Move** button to *move* the report(s) to another local folder that you previously created. **Published Reports** (see below) are available to *share* with anyone, using the associated URL.

Click the "Local" tab followed by the "Report Templates" tab to see the report templates listed

Report Name	Report Type	Collection	Description
10% range of staff FTEs—graph comparisons	Graph	Wisconsin Public Library Annual Report	Shows summary library, collection, use, and financial info of libraries in 10% range of total staff FTEs
10% range of total circulation--table comparisons- Revised from template 2015-12-16- Revised 2015-12-16	Table	Wisconsin Public Library Annual Report	Shows summary library, collection, use, and financial info of libraries in 10% range in circulation
10% range of total income--graph comparisons	Table	Wisconsin Public Library Annual Report	Shows summary library, collection, use, and financial info of libraries in 10% range of total revenues
10% range of municipal population--graph comparisons	Graph	Wisconsin Public Library Annual Report	Shows summary library, collection, use, and financial info of libraries in 10% range of municipal population
10% range of total circulation--graph comparisons	Graph	Wisconsin Public Library Annual Report	Shows summary library, collection, use, and financial info of libraries in 10% range in circulation
10% range of local revenue--graph comparisons	Graph	Wisconsin Public Library Annual Report	Shows summary library, collection, use, and financial info of libraries in 10% range in circulation

- You should see a screen with the following options. Check to be sure that the “Collection” is set to “Wisconsin Public Library Annual Report” and the “Period” is set for the reporting period you want to review.

Check the Collection and Period selections

Configure the settings as desired then click Run to generate the report.

The municipal population comparison range is preset to 10%

Value	% Filter Low	>=	<=	Filter High	Sequence	Remove
594,666	10%				8	

6. Click **“Run”** to generate the report (see above). The report display screen will show the libraries included in the results, with your library’s name highlighted in the results. By default, only 10 libraries display on each results screen—if you would like to display all the results, use the pull-down at the lower left to increase the total results (at right).

Monarch Library System	Eastern Shores Library System	4632 S. Taylor Dr.	(920) 208-4900	Sheboygan	Sheboygan
Nicolet Federated Library System	Nicolet Federated Library System	1595 Allouez Ave., Suite 4	(920) 448-4414	Green Bay	Brown
Northern Waters Library Service	Northern Waters Library Service	3200 Lakeshore Dr. E.	(715) 682-2365	Ashland	Ashland

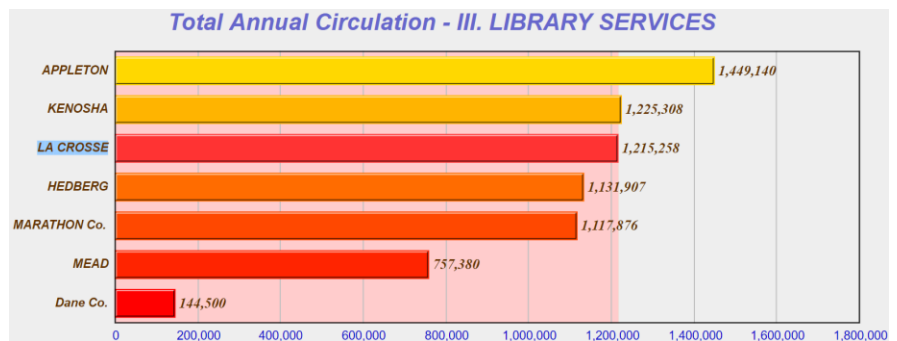
1/2 10 Sort multiple columns by holding down the shift key and clicking.

End Note

Loc "1/2" indicates that results are displayed in two pages.

Indicates 10 libraries/locations on each page. To display all libraries/locations on one screen, use the dropdown to select a higher number.

The software will generate bar charts that show how other annual totals compare among the libraries that met the comparison criteria (in this case, municipal population). For instance, if you want to show how your library's circulation compares with other libraries in the 10% range of municipal population, click the bar chart icon at the bottom of the column, "1a. Total Annual Circulation," to generate the following chart:



Each chart will display in a new browser window for viewing or printing. The bar for your library will be highlighted in a contrasting color to emphasize its position in the ranking. You can also download the result set using the Excel icon (you can see the icon in the screen capture under step 6. above).

To place the chart in a document, first, "save" the chart: right-click the image, then select "save as" to save the image. Save it with a name, and to a location that you will remember. You can then open the image using an image editing program to save it in another format, or to include it in a document.

New Report: "Graph comparison from local revenue range"

You can also use the report template with this title to generate results that show a string of bar graph comparisons. Select that title from among the Report Templates, then click "Run" to generate the results. Your library's relative position, as well as the average result, is highlighted in a contrasting color.

Library Summary Brochure

You can generate a brochure customized for your library showing common library comparison statistics and performance data formatted as a tri-fold Microsoft Word document. To do so, first, click the "WI" tab on the Manage Reports screen:

The screenshot shows the 'Manage Reports' interface. At the top, there is a navigation bar with links for Home, Menu, Help, Logout, Data Input, Library Trend, and Ranking Report. Below the navigation bar, the title 'Manage Reports' is centered. A paragraph of instructions explains how to generate, add, move, or remove reports. Below this, there are two tabs: 'Local' and 'WI'. A red arrow points to the 'WI' tab with the instruction '1. Select the WI tab'. Below the tabs, there are two sub-tabs: 'Documents' and 'Merge Reports'. A red arrow points to the 'Documents' sub-tab with the instruction '2. Select the Documents tab'. Below the sub-tabs is a table with columns: Report Name, Report Type, Collection, Description, and Updated. A red arrow points to the 'Library Brochure 2017' row with the instruction '3. Click the link for Library Brochure and the appropriate year'. Below the table, there is a file explorer window showing a file named 'Library Brochure 2017.docx'. A red arrow points to this file with the instruction '4. Open the downloaded brochure as a Microsoft Word document for your library's use'.

To generate a report, select an existing report by *Name* (below) or use the *Library Trend* and/or *Ranking Report* links from the navigation bar (above). Use the **Add** button to *Create* a new report in a *Local* folder. To *Move* or *Remove* one or more reports, select the report(s) (use the checkbox in the first column) and ... Use the **Remove** button to *remove* the report(s) that you previously created. Use the **Move** button to *move* the report(s) to another local folder that you previously created. Published Reports (see below) one, using the associated URL.

Local **WI**

Documents Merge Reports

Report Name	Report Type	Collection	Description	Updated
2014 Public Library System Annual Report Addenda	DOCUMENT	Wisconsin Public Library System Annual Report	Narrative content of the 2014 Public Library System Annual Report, Section VIII. Library System Evaluation and Certification of Compliance.	2015-02-03
2015 Public Library System Annual Report Addenda	DOCUMENT	Wisconsin Public Library System Annual Report	Narrative content of the 2015 Public Library System Annual Report, Section VIII. Library System Evaluation and Certification of Compliance.	2016-01-05
2016 Public Library System Annual Report Addenda	DOCUMENT	Wisconsin Public Library System Annual Report	Narrative content of the 2016 Public Library System Annual Report, Section VIII. Library System Evaluation and Certification of Compliance.	2016-12-20
2017 Public Library System Annual Report Addenda	DOCUMENT	Wisconsin Public Library System Annual Report	Narrative content of the 2017 Public Library System Annual Report, Section VIII. Library System Evaluation and Certification of Compliance.	2018-01-31
Library Brochure 2014	DOCUMENT	Wisconsin Public Library Annual Report	Custom brochure for each library to download and edit	2016-08-31
Library Brochure 2015	DOCUMENT	Wisconsin Public Library Annual Report	Custom brochure for each library to download and edit	2016-09-02
Library Brochure 2016	DOCUMENT	Wisconsin Public Library Annual Report	Custom brochure for each library to download and edit	2017-06-28
Library Brochure 2017	DOCUMENT	Wisconsin Public Library Annual Report	Custom brochure for each library to download and edit	2018-10-18

Library Brochure 2017.docx

Then click the link under Report Name for "Library Brochure." LibPAS will take required annual report data from the prior year and merge that into a pre-formatted Microsoft Word tri-fold brochure. The resulting document can be customized and edited as appropriate (such as deleting statistical items not appropriate for your location, or adding library hours or program information). If the three graphs are not generated automatically, click one-at-a-time to highlight them and press the F9 key.

Note: These instructions are designed to give an overview of the reports function of the LibPAS service. The custom percentile report templates have been tested with Wisconsin data. The [Wisconsin Public Library Service Data page](#) contains public library service data dating back to 1996 in Microsoft Excel spreadsheets. Some users may find it easier to manipulate the spreadsheet data that to utilize the LibPAS reporting tool.

If you have problems accessing the reports function or your LibPAS data, please contact your library system or email LibraryReport@dpi.wi.gov.