

# The 2016 Annual Report: Before, During, and After South Central Library System (SCLS)

Wisconsin Department of Public Instruction



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# If you're not new to the report...

## You will see that:

- The annual report process hasn't changed
- LibPAS exercises cover familiar features

## But you'll also learn:

- The connection between annual reports and funding
- Where things are now (dpi.wi.gov URLs changed)
- New data being collected for FY2016
- Some tweaks to the LibPAS user interface
- As much about LibPAS comparison reports as time today allows

# Topics for Today

Public Library Services Funding  
Framework

The Annual Report Calendar

2016 Public Library Annual Report

LibPAS\* Online Reporting System

Nine Things to Remember

\* Counting Opinions Library Performance Assessment System

# Funding Framework

The Public Library Development (PLD) Team has documented the funding framework within which state aid to public library systems and LSTA Grants to States funds are disbursed.

- For systems to receive state aid, they must comply with statutory requirements that include member library compliance with Chapter 43.
- Only libraries and systems in compliance and good standing are eligible to receive LSTA funds.

For more information, visit

[tinyurl.com/PL-Funding-Framework](https://tinyurl.com/PL-Funding-Framework)

# The Annual Report Process

Send annual report questions  
to: [LibraryReport@dpi.wi.gov](mailto:LibraryReport@dpi.wi.gov)

## October November

- PLD begins revising LibPAS for the 2016 public library annual report.
- PLD prepares drafts of accompanying forms, instructions, and other support material.

# The Annual Report Calendar

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to: [LibraryReport@dpi.wi.gov](mailto:LibraryReport@dpi.wi.gov)

## December

- Early in the month, PLD sends initial email to libraries via LibPAS and verifies email addresses with systems.
- Mid-month, PLD sends pre-fill Excel files to systems.
- Late in the month, PLD posts support material for the 2016 annual report at [dpi.wi.gov/pld/data-reports/annual-report](http://dpi.wi.gov/pld/data-reports/annual-report).
- Libraries can be compiling annual report information on the annual report data entry worksheet.

# The Annual Report Process

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## January

- Early to mid-month, PLD receives and uploads pre-fill annual report information from:
  - ✓ Library systems
  - ✓ Wisconsin Public Library Consortium (WPLC)
  - ✓ Resources for Libraries and Lifelong Learning (RL&LL).
- Mid-month, PLD opens LibPAS data collections.
- Public libraries begin entering annual report data.

# The Annual Report Process

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## February

- Public libraries finish entering 2016 annual report data and “Submit” in LibPAS.
- Library boards approve/sign annual reports and forward copies to their systems and municipalities.
- Library systems review, recommend revisions, “Approve” in LibPAS, and send one copy of each library’s report to the DPI no later than March 1, 2017.



# The Annual Report Process

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## March April May

- PLD reviews all public library and library system annual reports, follows up with libraries and systems, and makes needed corrections.
- PLD begins compiling data for preliminary 2016 *Wisconsin Public Library Service Data*.
- PLD begins compiling data for the IMLS 2016 Public Library Survey (PLS).

# The Annual Report Process

Send annual report questions  
to: [LibraryReport@dpi.wi.gov](mailto:LibraryReport@dpi.wi.gov)

## June July

- PLD finishes compiling data for preliminary 2016 *Wisconsin Public Library Service Data*.
- PLD begins the process of submitting data to the Institute of Museums and Library Service (IMLS) 2016 Public Library Survey (PLS).
- IMLS begins reviewing Wisconsin PLS data.
- PLD posts library brochure Word merge file.

# The Annual Report Process

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to: [LibraryReport@dpi.wi.gov](mailto:LibraryReport@dpi.wi.gov)

## August September

- Typically mid to late August, IMLS requests clarification of Wisconsin PLS data as needed.
- PLD follows up with libraries, makes revisions as needed, and responds to IMLS.
- IMLS requests further information as needed.
- When IMLS locks (accepts) PLS data, PLD posts final 2016 *Wisconsin Public Library Service Data* and *Wisconsin Public Library Service Trends*.

# 2016 Public Library Annual Report

Send annual report questions  
to: [LibraryReport@dpi.wi.gov](mailto:LibraryReport@dpi.wi.gov)

## Changes for FY2016

**Electronic Collections:** A collection of electronically stored data or unit records—facts, bibliographic data, abstracts, texts, photographs, music, video, etc.—with a common user interface and software for the retrieval and use of the data. Electronic Collections do not have a circulation period, and may be retained by the patron.

For more information, see the WI Libraries for Everyone blog post [Looking Ahead: New Data in FY2016 Annual Reports](#)

# 2016 Public Library Annual Report

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to: [LibraryReport@dpi.wi.gov](mailto:LibraryReport@dpi.wi.gov)

## Changes for FY2016

Section II. Library Collection – Number of Electronic Collections. Locally owned or leased, purchased by system or consortia (may be prefilled), and statewide via BadgerLink (46 - will be prefilled)

Section III. Library Services – Electronic Collection Retrievals. Local, system or consortia, and statewide (none prefilled)

Section XII. Technology – Door Counters.

# 2016 Public Library Annual Report

Send annual report questions  
to: [LibraryReport@dpi.wi.gov](mailto:LibraryReport@dpi.wi.gov)

## Report Sections

### Section I. General Information

- If your library is changing system membership, remember that the annual report is for 2016. Director email is likely the only general information to change.
- If your library has the same hours all year, you can report all 52 weeks in Winter Hours Open per Week and Number of Winter Weeks.

# 2016 Public Library Annual Report

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## Section Ib. Outlet Information

- If your library doesn't have branches or a bookmobile, this section in LibPAS has headings but no fields.
- If you do have branches, remember that the main library is also an outlet that is entered in Section Ib.

# 2016 Public Library Annual Report

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to: [LibraryReport@dpi.wi.gov](mailto:LibraryReport@dpi.wi.gov)

## Section II. Library Collection

- The number of units (copies) of downloadable content (e-books, e-audio, e-video) are provided by the systems and uploaded into LibPAS by PLD.
- The number of state-provided electronic collections is provided by the DPI's Resources for Libraries and Lifelong Learning (RL&LL) team and uploaded into LibPAS by PLD.



# 2016 Public Library Annual Report

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## Section III. Library Services

- Instructions for running reports of state-provided electronic collection retrievals will be provided by the DPI's Resources for Libraries and Lifelong Learning (RL&LL) team.
- Program attendance includes all people who came to programs focused on a particular age group. Parents at a children's program are included in Total Attendance at Programs for Children (0-11).

# 2016 Public Library Annual Report

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## Section IV. Library Governance

- Report only current members of the Board of Trustees.
  - ✓ Do not list trustees who left the board during the report year.
  - ✓ Do not list nonvoting board members.
- Remember to enter the total number of library board members, *including* vacancies.

# 2016 Public Library Annual Report

Send annual report questions  
to: [LibraryReport@dpi.wi.gov](mailto:LibraryReport@dpi.wi.gov)

## Section V.

### Library Operating Revenue

- If you receive funds from other municipalities and you are not a joint library, report those revenues as Contract Income from other governmental units.
- Double-check LSTA grant numbers. For the annual report, grant numbers are the two-digit grant year, a dash, and a three-digit identifier; for example, 16-303.
- Total Operating Revenue cannot be less than Total Operating Expenditures.

# 2016 Public Library Annual Report

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## Section VI.

### Library Operating Expenditures

- If you spent funds for an LSTA grant award, include that amount in Expenditures from Federal Program Sources, *regardless of when the expenditure is reimbursed. Particularly important now that the LSTA grant year spans calendar years.*
- Total Operating Expenditures cannot be greater than Total Operating Revenue.

# 2016 Public Library Annual Report

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## Section VII. Library Capital Revenue, Expenditures, Debt Retirement, and Rent

- Be certain to list capital revenue and expenditures by source; that is, federal, state, municipal, county, or other.

# 2016 Public Library Annual Report

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to: [LibraryReport@dpi.wi.gov](mailto:LibraryReport@dpi.wi.gov)

## Section VIII.

### Other Funds Held by the Library Board

- Report in this section any funds held by the library board that have not been reported in a previous section, *except* Trust Funds.

## Section IX. Trust Funds

- Indicates a library trustee is appointed and bonded as financial secretary and donated funds/property have been transferred to be invested as allowed under Wis. Stats. s. 43.58 (7).

# 2016 Public Library Annual Report

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## Section X. Staff

- The list of *budgeted* positions is only used to compile salary and position data; however, total FTE of positions cannot be greater than Library Staff Full-Time Equivalents (FTEs). One FTE equals 40 hours worked per week.
- If a budgeted position was vacant part of the year, list its *budgeted* salary/wages, not the amount paid. For example, a director who started July 1 and was paid \$21,000 in 2016 should be listed with the position's annual salary of \$42,000.

# 2016 Public Library Annual Report

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## Section XI.

### Public Library Loans of Material to Nonresidents

Page 6

PI-2401

#### XI. PUBLIC LIBRARY LOANS OF MATERIAL TO NONRESIDENTS

1. Of the total circulation reported for your library from Section III, item 1, what was the total circulation to nonresidents *See instructions for definition of nonresident*

Divide nonresident circulation among the following categories. The total of 2 through 6 below should not be greater than the number reported in item 1 above.	a. Those with a Library	b. Those without a Library	c. Subtotal
2. Circulation to Nonresidents Living in Your County			
3. Circulation to Nonresidents Living in Another County in Your System			
4. Circulation to Nonresidents Living in an Adjacent County Not in Your System			

- 2b. Circulation to residents of your county who do not have a local public library is used to calculate county payments for nonresident use.



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## Section XI.

### Public Library Loans of Material to Nonresidents

1. Of the total circulation reported for your library from Section III, item 1, what was the total circulation to nonresidents <i>See instructions for definition of nonresident</i>			
Divide nonresident circulation among the following categories. The total of 2 through 6 below should not be greater than the number reported in item 1 above.	a. Those with a Library	b. Those without a Library	c. Subtotal
2. Circulation to Nonresidents Living in Your County			
3. Circulation to Nonresidents Living in Another County in Your System			
4. Circulation to Nonresidents Living in an Adjacent County Not in Your System			
5. Circulation to All Other Wisconsin Residents	6. Circulation to Persons from Out of the State		

- 1. Total circulation to nonresidents is not an automatic total, but the sum of circulation to nonresidents in 2-6 cannot be greater than the total entered in item 1.

# 2016 Public Library Annual Report

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## Section XI.

### Public Library Loans of Material to Nonresidents

Divide nonresident circulation among the following categories. The total of 2 through 6 below should not be greater than the number reported in item 1 above.	a. Those with a Library	b. Those without a Library	c. Subtotal
2. Circulation to Nonresidents Living in Your County			
3. Circulation to Nonresidents Living in Another County in Your System			
4. Circulation to Nonresidents Living in an Adjacent County Not in Your System			

- The sum of circulation to nonresidents in adjacent counties (9) cannot be greater than 3b plus 4b.

9. Circulation to Nonresidents Living in an Adjacent County Who Do Not Have a Local Public Library			
Name of County	Circulation	Name of County	Circulation
a.		f.	
b.		g.	
c.		h.	
d.		i.	
e.		j.	

# 2016 Public Library Annual Report

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## Section XII. Technology

- The new door counter question—Does your library use door counters?—will help PLD develop outcome measurement support initiatives and strengthen the accuracy and use of library data.

Door counters can be either electronic or mechanical means of detecting entrance / exit of library users.

# 2016 Public Library Annual Report

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## Section XIII.

### Literacy Offerings and Drop-in Activities

- Literacy offerings are combinations of programs and drop-in activities.
- A drop-in activity is a planned, independent activity available for a definite time period which introduces participating individuals to any of the broad range of library services or activities which directly provide information to participants.

# 2016 Public Library Annual Report

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## Section XIV.

### Public Library Assurance of Compliance with System Membership Requirements

- Compliance items in this section confirm that your library operates as required by Wisconsin Statutes and Administrative Rules.
  - ✓ Legally-appointed library board, three-year terms
  - ✓ Exclusive control of funds, board approval of expenditures
  - ✓ Certified library director

# 2016 Public Library Annual Report

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## Section XV. Certification

- If the annual report is approved at a board meeting but the president is unavailable, another officer can sign, based on the assumption that the president would have signed approval of the report.

When next available, the president should confirm that board approval, but sending notification to PLD is not required.

# 2016 Public Library Annual Report

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## Statement Concerning Public Library System Effectiveness

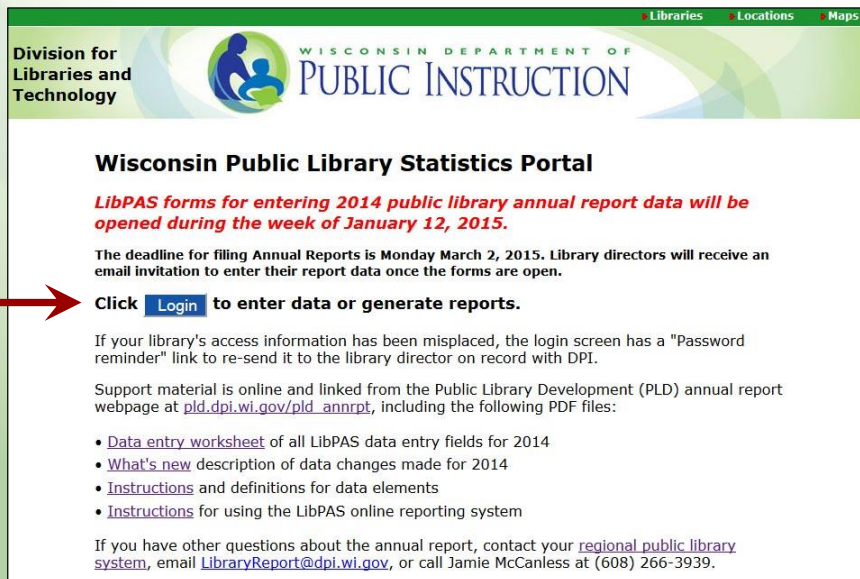
- Regardless of the board's response, the board president must sign and date the statement certification.
- Statements are due by the same date as the annual report: Wednesday, March 1, 2017.
- Systems routinely request copies of system effectiveness statements that have been sent separately to PLD.



# LibPAS Online Reporting System

Before and during data collection, DPI sends email via LibPAS to all accounts with information about the annual report, including username and password.

- Go to [wi.countingopinions.com](http://wi.countingopinions.com)

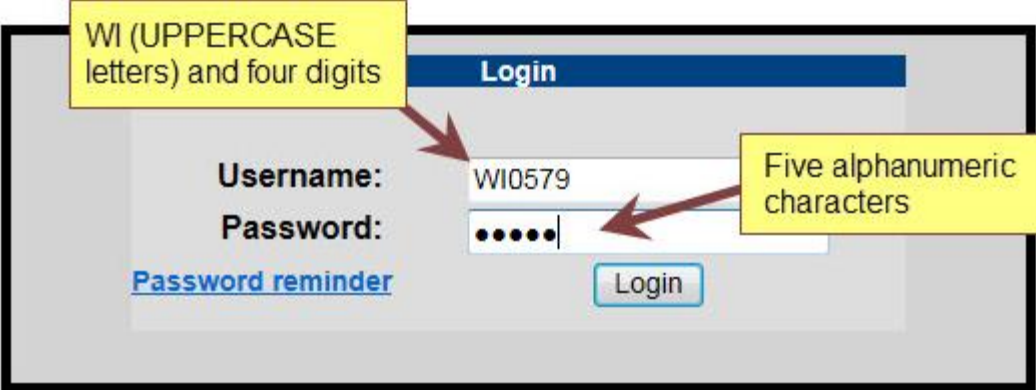


This welcome page has announcements, the **Login** button, and links to support documents.



# LibPAS Online Reporting System

If you misplace your LibPAS username or password:



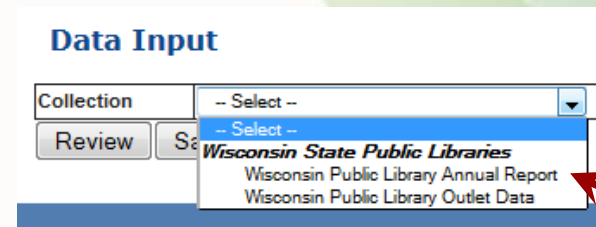
The screenshot shows the LibPAS Login page. At the top, there is a blue header with the word "Login". Below the header, there are two input fields: "Username:" and "Password:". The "Username:" field contains the text "WI0579". The "Password:" field contains five dots. To the right of the "Password:" field, there is a blue link that says "Password reminder". Below the "Password:" field, there is a blue button that says "Login". There are two yellow callout boxes with red arrows pointing to the input fields. The first callout box, located above the "Username:" field, contains the text "WI (UPPERCASE letters) and four digits". The second callout box, located to the right of the "Password:" field, contains the text "Five alphanumeric characters".

- Click “Password reminder” on the Login page and enter the email address for your account. Your username and password will be emailed to you.
- Contact your library’s system headquarters.
- Send email to [LibraryReport@dpi.wi.gov](mailto:LibraryReport@dpi.wi.gov) or call Jamie McCanless at (608) 266-3939.

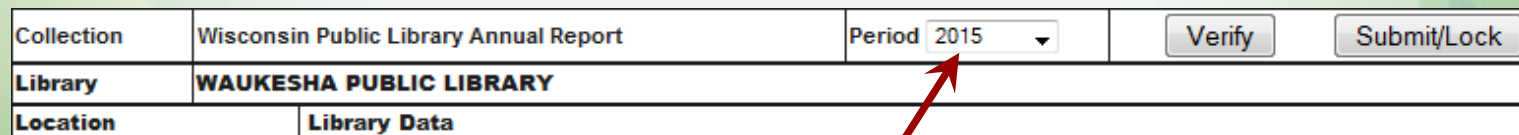
# LibPAS Online Reporting System

Enter report information in the Data Input page of the Wisconsin Public Library Annual Report collection.

- Libraries with branches or bookmobiles will first see a Collection dropdown list that includes the Wisconsin Public Library Outlet Data. Select the *annual report* collection.



The screenshot shows the 'Data Input' section of the LibPAS system. It includes a 'Collection' dropdown menu, a 'Review' button, and a 'Save' button. The dropdown menu is open, showing three options: '-- Select --', 'Wisconsin State Public Libraries', and 'Wisconsin Public Library Annual Report'. A red arrow points to the 'Wisconsin Public Library Annual Report' option.



The screenshot shows the data input form with the following fields: 'Collection' (Wisconsin Public Library Annual Report), 'Period' (2015), 'Library' (WAUKESHA PUBLIC LIBRARY), and 'Location' (Library Data). A red arrow points to the 'Period' dropdown menu.

Collection	Wisconsin Public Library Annual Report	Period	2015	Verify	Submit/Lock
Library	WAUKESHA PUBLIC LIBRARY				
Location	Library Data				

- At the top of the data input form, the current period should be displayed. If not, select 2016 to enter annual report information.

# LibPAS – Your Turn

## Find your way to Data Entry

1. Go to [wi.countingopinions.com](http://wi.countingopinions.com)
2. Log in to your LibPAS account.
3. Go to the Data Input window of the “Wisconsin Public Library Annual Report” collection.
4. For this workshop, select the “2016 CLASS” report period.

# LibPAS Online Reporting System

Reset clears all changes made since last logging in to LibPAS.

**Data Input** Review Save Reset Previous Next

Review Save

**I. GENERAL INFORMATION**

1b. OUTLET INFORMATION  
II. LIBRARY COLLECTION  
III. LIBRARY SERVICES  
IV. LIBRARY GOVERNANCE  
V. LIBRARY OPERATING REVENUE  
VI. LIBRARY OPERATING EXPEND  
VII. LIBRARY CAPITAL  
VIII. OTHER FUNDS HELD BY THE  
IX. TRUST FUNDS  
X. STAFF (FTE)  
XI. LOANS TO NONRESIDENTS  
XII. TECHNOLOGY  
XIII. YOUTH SERVICES  
XIV. ASSURANCE OF COMPLIANCE  
XV. STATEMENT CONCERNING SY

Previous Next

« Hide

Correction Wisconsin Public Library Annual Report  
Library Wisconsin State Public Libraries  
Location

**I. GEN**

This section requests basic information on corrections only as necessary.

1. Na  
2. Pub  
Salut  
3a. Head Librarian First Name  
3  
4  
4

Review displays all sections and questions in one long, single-page display.

Click a title in the section list to display only that portion of the online form.

To collapse the sidebar and view more of the form in your browser window, click Hide.

## Page Navigation

- Click Next and Previous to move through the form section by section.
- Click each field or use Tab or Enter key to proceed to the next field.

# LibPAS – Your Turn

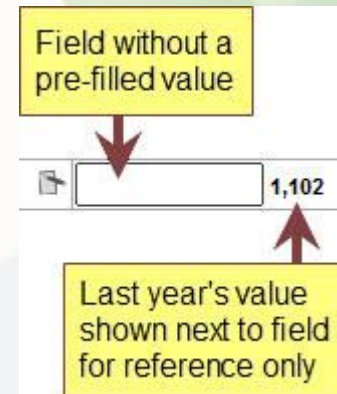
## Navigate sections of Data Entry

1. Display one report section.
2. Without selecting by title, display previous / next sections.
3. Collapse the sidebar.
4. Expand the sidebar.
5. Display all of the annual report sections together in Data Entry.

# LibPAS Online Reporting System

## Pre-filled Annual Report Data

Before libraries begin entering report data, PLD loads some information for the report year into LibPAS with data provided by the system. Other fields that do not often change are pre-filled with data from the previous report year.



In some places, the previous year's data is shown to the right of blank fields *for reference only*. Reference data is not pre-filled information and is not saved as a response for the current reporting year.



# LibPAS Online Reporting System

## Online Help / Notes to Self


To display help about what to enter in a field, click the underlined field name. The Indicator Notes window has the field name, definition, and Notes field. To enter notes to yourself, enter information and click Add.

Indicator Notes	
<small>This is often useful for recording details about interpretation of the definition in local terms. Examples: who to contact for information, a translation of the text, etc.</small>	
Indicator	1. Salaries and Wages
Definition	Includes salaries and wages for all library staff (including plant operations, security, and maintenance staff) for the fiscal year. Include salaries and wages before deductions but exclude employee benefits.
Short Name	SALARIES
Notes	
<input type="text"/>	
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

*LibPAS does not include indicator notes in annual report data.* To provide supporting explanations or descriptions of information that *will* be saved with report data, use data notes.

# LibPAS Online Reporting System

## Data Notes

To explain data, click the  notes icon to the left of the data entry field. In the PI Value Notes window, enter information and click Add. You can add as many data notes as needed.

Notes can be added to any data entry field. Most notes are optional, but explaining information as you add it can significantly reduce the number of PLD's follow-up questions. Other, required explanations must be made as information is entered.



# LibPAS – Your Turn

## Add notes in Data Entry

1. Display the indicator notes for a data field in Section I.
2. Add a note about the data you will remember.
3. Display the PI value notes for the same data field.
4. Add a different, personal note you will also remember.

# LibPAS Online Reporting System

## Saving Data

LibPAS saves data displayed in the current field when you:

- Press Tab
- Press Enter
- Click elsewhere on the page

To save all information in the Data Input window, click Save (above the section list and at the top and bottom of the window).

## Caution: Reset

The Reset button (next to Save at top and bottom of the window) clears any changes you made since you last logged in to LibPAS.

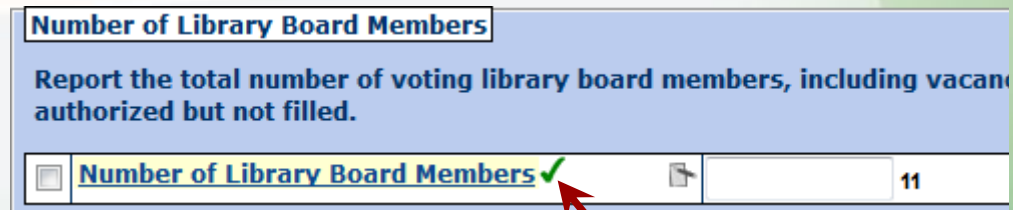
# LibPAS Online Reporting System

## Edit Checks


Edit checks test field data at one of two points:

- As soon as you leave a data entry field
- When you Verify or Submit/Lock your report data

Fields with edit checks have a green check ✓ next to the field label.



The screenshot shows a web form with a blue header bar. The header bar contains the text "Number of Library Board Members" in a bold, black font. Below the header bar, there is a text area with the instruction "Report the total number of voting library board members, including vacant authorized but not filled." Below the text area, there is a data entry row. The row has a checkbox on the left, followed by the label "Number of Library Board Members" in a blue, underlined font, a green checkmark to the right of the label, a small icon to the right of the checkmark, and a text box on the right containing the number "11". A red arrow points from the bottom right of the slide towards the green checkmark.

Number of Library Board Members			
Report the total number of voting library board members, including vacant authorized but not filled.			
<input type="checkbox"/>	Number of Library Board Members ✓		11

# LibPAS Online Reporting System



## Edit Checks and Examples

Edit checks that fail require either:

- An explanation of the data
  - ✓ Changes to library name or system
  - ✓ Other Operating Revenue identical to last year
- A change to data
  - ✓ Number of board members cannot be zero.
  - ✓ Total Operating Expenditures cannot be greater than Total Operating Revenue.


# LibPAS – Your Turn

Fail and pass an entry edit check

1. In Section I, enter a wild number of bookmobiles (item 15).
2. In the PI Value Notes window, explain “Jamie said.” Click Add.
3. See that the notes icon has changed from  to  to show the field has one or more notes.

# LibPAS Online Reporting System

## Verifying Report Data



Collection	Wisconsin Public Library Annual Report	Period	2015	<input type="button" value="Verify"/>	<input type="button" value="Submit/Lock"/>
Library	WAUKESHA PUBLIC LIBRARY				
Location	Library Data				

Verify runs the same edit checks that are performed when report data is locked. LibPAS displays a row of white text on a red background below:

- Blank fields that are required
- Fields that do not pass the test conditions of the edit check.

5. Other Operating Expenditures	
<input type="checkbox"/>	5. Other Operating Expenditures \$ \$38,685
Required	Required: a value is required!
6. Total Operating Expenditures	
Add 1 through 5	
<input type="checkbox"/>	Total Operating Expenditures ✓ \$ \$272,918
EDIT CHECK FAILED:	Total operating expenditures may not be greater than total operating income. TOTOPEXP <= TOTINCM 272918.00000 <= 272913

# LibPAS – Your Turn

Fail and pass a submit edit check

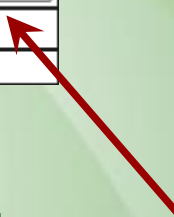
1. In Section I, enter 54 winter weeks (item 19b).
2. Reload the window (Ctrl-R or ⌘). Click Verify and see the error message for 19b.
3. Change winter weeks to 52.
4. Reload / Verify again. Does 19b still have an error message?



# LibPAS Online Reporting System

## Locking Report Data

Collection	Wisconsin Public Library Annual Report	Period 2015 ▼	Verify	Submit/Lock
Library	WAUKESHA PUBLIC LIBRARY			
Location	Library Data			



When you have entered, checked, and corrected your annual report data, click Submit/Lock to indicate the data entry process is complete. Any edit checks that fail must be resolved to submit/lock your data.

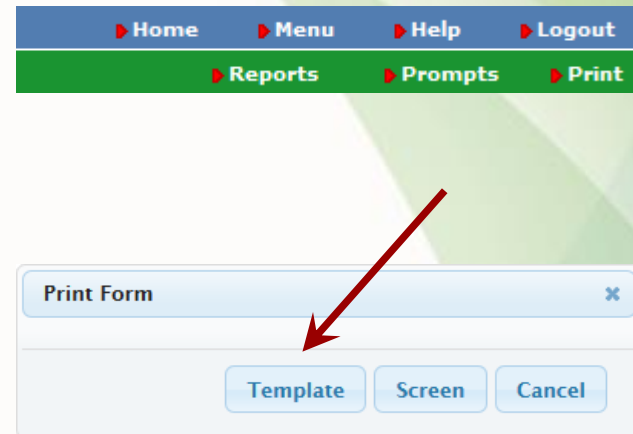
- Once locked, only your system and PLD can unlock your data so changes can be made.
- Once the system reviews your report and clicks Approve, only PLD can unlock your data.

# LibPAS Online Reporting System

## Printing Report Files

To generate the annual report form with data:

- At the top right of the LibPAS data entry page, click Print (in the green header bar).
- LibPAS asks what form to print. Click Template.
- Your web browser asks to open or save the file.



You can print the annual report form any time, but until your data is locked the PDF file has a **DRAFT** watermark.

# LibPAS – Your Turn

## Generate the annual report form

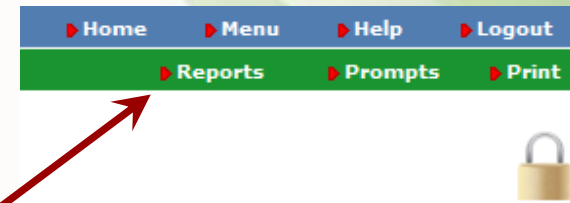
1. Generate and open the annual report output file (for class, the file is first and last page only).
2. Note that the Comments page has notes you entered. Which of the notes you entered earlier is/are included?

# LibPAS Online Reporting System

## Generating the Brochure

PLD offers the Word merge file for a library brochure:

- At the top right of the LibPAS data entry page, click Reports.
- On the Manage Reports page, click the WI tab.
- Click the template link.
- Your web browser asks to open or save the file.

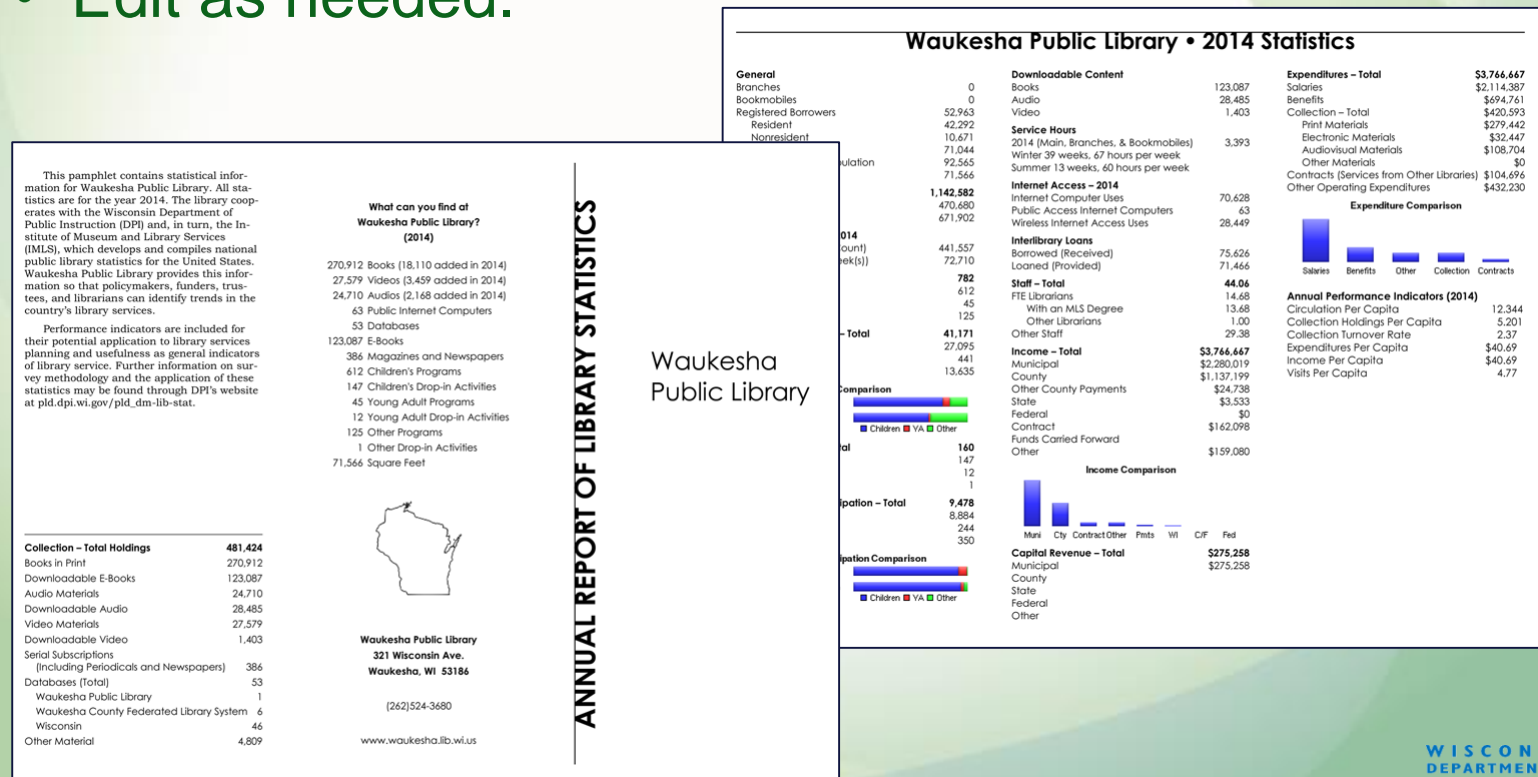
A screenshot of the 'Manage Reports' page in LibPAS. At the top, there are tabs for 'Local' and 'WI', with 'WI' being the active tab. Below the tabs is a 'Documents' section containing a table of reports. The table has columns for Report Name, Report Type, Collection, Description, and a partially visible 'Up' column. The table lists several reports, including '2014 Public Library System Annual Report Addenda' and 'Library Brochure' for the years 2010 through 2014. Each brochure entry includes a link to the report and a description of its content.

Report Name	Report Type	Collection	Description	Up
<a href="#">2014 Public Library System Annual Report Addenda</a>	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.	20
<a href="#">Library Brochure 2010</a>	DOCUMENT	Wisconsin Public Library Annual Report	Custom brochure for each library to download and edit	20
<a href="#">Library Brochure 2011</a>	DOCUMENT	Wisconsin Public Library Annual Report	Custom brochure for each library to download and edit	20
<a href="#">Library Brochure 2012</a>	DOCUMENT	Wisconsin Public Library Annual Report	Custom brochure for each library to download and edit	20
<a href="#">Library Brochure 2013</a>	DOCUMENT	Wisconsin Public Library Annual Report	Custom brochure for each library to download and edit	20
<a href="#">Library Brochure 2014</a>	DOCUMENT	Wisconsin Public Library Annual Report	Custom brochure for each library to download and edit	20

# LibPAS Online Reporting System

## Generating the Brochure

- Edit as needed.



# LibPAS – Your Turn

## Generate the library brochure

1. Find your way to the list of WI merge documents.
2. Generate and open a library brochure.
3. Delete some information that doesn't apply to your library.

# LibPAS Online Reporting System

## Creating LibPAS Table Reports from Templates

- On your LibPAS home page, click Reports at top right or **Library Reports** at the bottom.
- On the Manage Reports page, click the name of a table report in the Local - Report Templates list.

Home Page ▾ Reports Data Input Home Menu Logout Profile Libraries Locations Maps

Division for Libraries and Technology WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION

**WAUKESHA PUBLIC LIBRARY**

*LibPAS forms for entering 2015 public library and library system annual report data will be opened in mid-January 2016.*

Click **Data Entry** to generate your annual report. Annual reports for previous years can be viewed and printed.

Support material will be online and linked from the Public Library Development (PLD) annual report webpage at [pld.dpi.wi.gov/pld\\_annrpt](http://pld.dpi.wi.gov/pld_annrpt), including the following PDF files:

- [Data entry worksheet](#) of all LibPAS data entry fields for 2015
- [What's new](#) description of data changes made for 2015
- [Instructions](#) and definitions for data elements
- [Instructions](#) for using the LibPAS online reporting system

If you have other questions about the annual report, contact your [regional public library system](#), email [LibraryReport@dpi.wi.gov](mailto:LibraryReport@dpi.wi.gov), or call Jamie McCanless at (608) 266-3939.

**Report Templates for Quick Comparison**

To access report templates, continue to **Library Reports**

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Report Name	Report Type	Collection
<a href="#">10% range of total income-graph comparisons</a>		Wisconsin Public Library Annual Re
<a href="#">10% range of municipal population-graph comparisons</a>	Table	Wisconsin Public Library Annual Re
<a href="#">10% range of local revenue-graph comparisons</a>	Graph	Wisconsin Public Library Annual Re
<a href="#">10% range of local revenue-table comparisons</a>	Table	Wisconsin Public Library Annual Re
<a href="#">10% range of total circulation-table comparisons</a>	Table	Wisconsin Public Library Annual Re
<a href="#">10% range of municipal population-table comparisons</a>	Table	Wisconsin Public Library Annual Re
<a href="#">10% range of total income-table comparisons</a>	Graph	Wisconsin Public Library Annual Re



# LibPAS Online Reporting System

## Creating LibPAS Table Reports from Templates

- Use checkboxes to select / deselect fields available in the template.
- Add / change value ranges in each field's Filter Low and Filter High settings.
- Click Run at top or bottom of the page.

The screenshot displays the LibPAS Online Reporting System interface. At the top, there are tabs for 'Report Settings', 'Options', 'Option Settings', and 'Format'. The 'Report Settings' tab is active, showing a form for configuring a report. The 'Collection' is set to 'Wisconsin Public Library Annual Report', the 'Period' is '2014', and the 'Report Name' is '10% range of total circulation--table comparisons'. The 'Description' is 'Shows summary library, collection, use, and financial info compared to libraries in 10% range of total circulation'. The 'Title' is 'Summary library, collection, use, and financial info'.



Below the 'Report Settings' tab, there is a 'Report Type' dropdown set to 'Table'. There are 'Run' and 'Save as New Report' buttons. The main section is titled 'Indicators' and contains a table with columns for 'Value', '% Filter Low', '>=', '<= Filter High', and 'Filter High'. The table lists various indicators, including '1. Name of Library', '2. Public Library System', '7. City/Village/Town', '8. County', '14. Number of Branches (only if applicable)', '20. Square Footage of Public Library (this location only)', '20. Annual Public Service hours', '20. Annual Public Service hours branches and bookmobiles', 'Population', 'Municipal Population', 'Population of the Legal Service Area', '1a. Books in Print (end of year total)', '3a. Audio Materials (end-of-year total)', and '3b. Video Materials'.

Red arrows indicate the following actions:

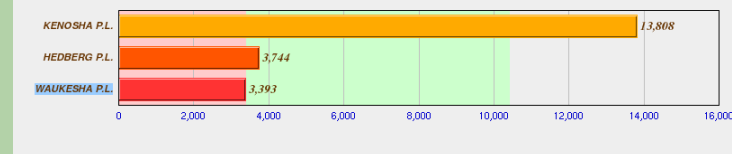
- An arrow points from the 'Run' button at the top of the page to the 'Run' button at the bottom of the page.
- An arrow points from the 'Filter Low' and 'Filter High' columns to the 'Filter Low' and 'Filter High' columns.
- An arrow points from the 'Run' button at the bottom of the page to the 'Run' button at the bottom of the page.

# LibPAS Online Reporting System

## Creating LibPAS Table Reports from Templates

- Click the Excel  icon to open / save report data.
- Click the bar graph  icon to display a PNG image for the field that you can save to use.

Public Service hours for the main library and any branches and bookmobiles - Hours



Summary library, collection, use, and financial info

10% range of total circulation--table comparisons

Collection: **Wisconsin Public Library Annual Report** Period: 20

Locations (3) ^	20. Annual Public Service hours for the main library and any branches and bookmobiles v	20. Square Footage of Public Library (this location only) v	Municipal Population v	Population of the Legal Service Area v	1a. Books in Print (end of year total) v
HEDBERG PUBLIC LIBRARY	3,744	65,000	63,525	81,020	206,446
KENOSHA PUBLIC LIBRARY	13,808	94,018	99,680	135,408	317,943
WAUKESHA PUBLIC LIBRARY	3,393	71,566	71,044	92,565	270,912

	Total	Avg	Max	Min
20. Annual Public Service hours for the main library and any branches and bookmobiles	20,945	6,982	13,808	3,393
20. Square Footage of Public Library (this location only)	230,584	76,861	94,018	65,000
Municipal Population	234,249	78,083	99,680	63,525
Population of the Legal Service Area	308,993	102,998	135,408	81,020
1a. Books in Print (end of year total)	795,301	265,100	317,943	206,446

Filters	Values
	Min / % Max
1a. Total Annual Circulation	10%

# LibPAS – Your Turn

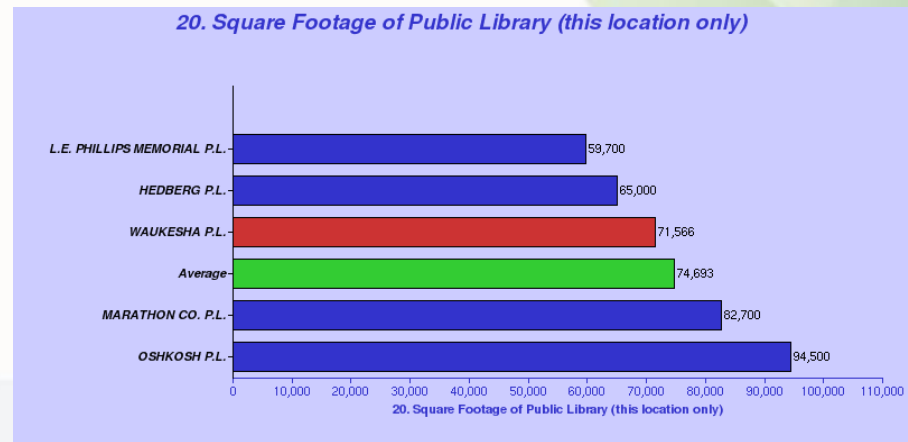
## Run a table report template

1. Find your way to the template list and open a table template.
2. Run the report.
3. Return to the template, and select / deselect template fields.
4. Change the filter range(s).
5. Run the report again.

# LibPAS Online Reporting System

## Creating LibPAS Graph Reports from Templates

- Choose a graph report template.
- Select fields.
- Edit value ranges.
- Click Run.
- Save graph PNG images to use elsewhere.



# LibPAS – Your Turn

## Run a graph report template

1. Find your way to the template list and open a graph template.
2. Run the report.
3. Return to the template, and select / deselect template fields.
4. Change the filter range(s).
5. Run the report again.

# LibPAS Online Reporting System

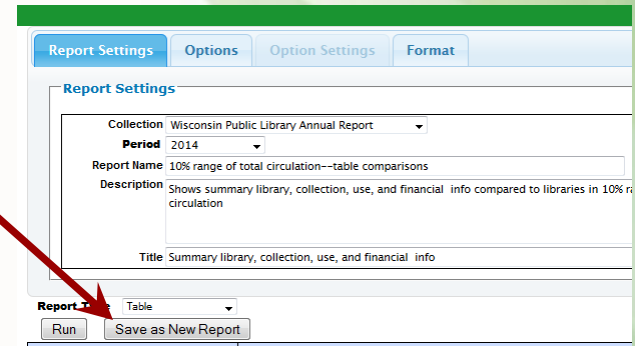
## Creating New LibPAS Reports from Templates

- In a template's Report Settings window, click

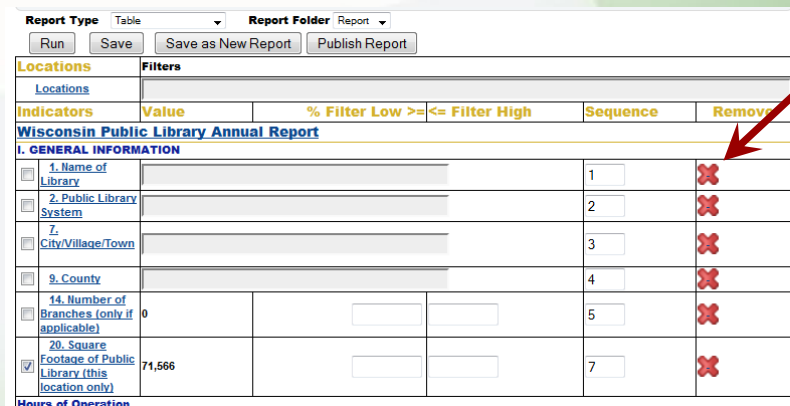
Save as New Report

- To remove a field, click its red **X** in the Remove column.

- Remember to **Save** often as you edit the new report.



The screenshot shows the 'Report Settings' window with tabs for 'Report Settings', 'Options', 'Option Settings', and 'Format'. The 'Report Settings' tab is active, showing fields for 'Collection' (Wisconsin Public Library Annual Report), 'Period' (2014), 'Report Name' (10% range of total circulation--table comparisons), 'Description' (Shows summary library, collection, use, and financial info compared to libraries in 10% circulation), and 'Title' (Summary library, collection, use, and financial info). At the bottom, there are buttons for 'Run', 'Save as New Report', and 'Publish Report'. A red arrow points to the 'Save as New Report' button.




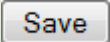
The screenshot shows the 'Report Editor' interface. At the top, there are tabs for 'Report Type' (Table) and 'Report Folder' (Report). Below these are buttons for 'Run', 'Save', 'Save as New Report', and 'Publish Report'. The main area is divided into 'Locations' and 'Filters' sections. The 'Locations' section contains a table with columns: 'Indicators', 'Value', '% Filter Low >= <= Filter High', 'Sequence', and 'Remove'. The table lists various indicators for the 'Wisconsin Public Library Annual Report'.

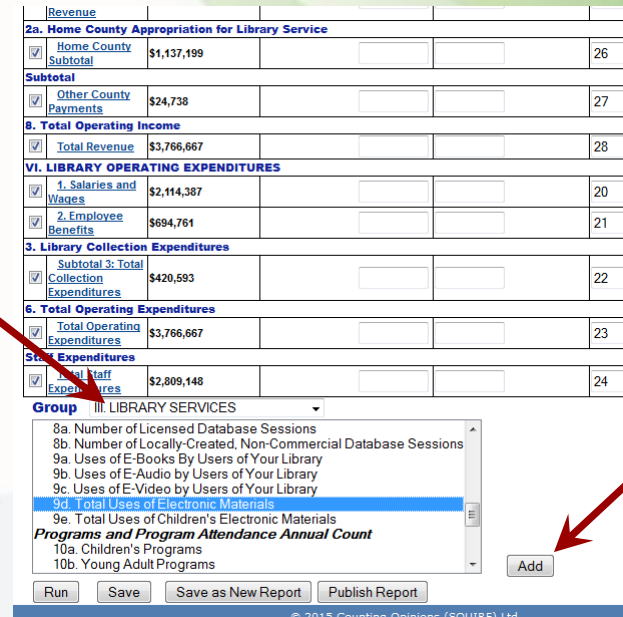
Indicators	Value	% Filter Low >= <= Filter High	Sequence	Remove
<b>I. GENERAL INFORMATION</b>				
<input type="checkbox"/> 1. Name of Library			1	X
<input type="checkbox"/> 2. Public Library System			2	X
<input type="checkbox"/> 3. City/Village/Town			3	X
<input type="checkbox"/> 4. County			4	X
<input type="checkbox"/> 5. Number of Branches (only if applicable)	0		5	X
<input checked="" type="checkbox"/> 6. Square Footage of Public Library (this location only)	71,566		7	X

Hours of Operation

# LibPAS Online Reporting System

## Creating New LibPAS Reports from Templates

- To add a field:
  - ✓ In the Group list, select its section of the report.
  - ✓ Select the field to add.
  - ✓ Click .
- Control-click to select and add multiple fields.
- Remember to  often as you edit the new report.



The screenshot displays the LibPAS Online Reporting System interface. It features a table with various report sections and their corresponding values. A red arrow points to the 'Add' button in the 'Group' list, which is used to add fields to the report. The 'Add' button is located at the bottom right of the 'Group' list.

Revenue				
<b>2a. Home County Appropriation for Library Service</b>				
<input checked="" type="checkbox"/> Home County Subtotal	\$1,137,199			26
<b>Subtotal</b>				
<input checked="" type="checkbox"/> Other County Payments	\$24,738			27
<b>8. Total Operating Income</b>				
<input checked="" type="checkbox"/> Total Revenue	\$3,766,667			28
<b>VI. LIBRARY OPERATING EXPENDITURES</b>				
<input checked="" type="checkbox"/> 1. Salaries and Wages	\$2,114,387			20
<input checked="" type="checkbox"/> 2. Employee Benefits	\$694,761			21
<b>3. Library Collection Expenditures</b>				
<input checked="" type="checkbox"/> Subtotal 3: Total Collection Expenditures	\$420,593			22
<b>6. Total Operating Expenditures</b>				
<input checked="" type="checkbox"/> Total Operating Expenditures	\$3,766,667			23
<b>Staff Expenditures</b>				
<input checked="" type="checkbox"/> Total Staff Expenditures	\$2,809,148			24
<b>Group III. LIBRARY SERVICES</b>				
8a. Number of Licensed Database Sessions				
8b. Number of Locally-Created, Non-Commercial Database Sessions				
9a. Uses of E-Books By Users of Your Library				
9b. Uses of E-Audio by Users of Your Library				
9c. Uses of E-Video by Users of Your Library				
<b>3d. Total Uses of Library Electronic Materials</b>				
9e. Total Uses of Children's Electronic Materials				
<b>Programs and Program Attendance Annual Count</b>				
10a. Children's Programs				
10b. Young Adult Programs				
<input type="button" value="Add"/>				
<input type="button" value="Run"/> <input type="button" value="Save"/> <input type="button" value="Save as New Report"/> <input type="button" value="Publish Report"/>				

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# LibPAS – Your Turn

Base a new report on a template

1. Open the “10% range of total circulation” table template and save it as a new report.
2. Remove Number of Branches.
3. Add Section III. item 9d. Total Uses of Electronic Materials.
4. Save and run the report.

# LibPAS Online Reporting System

## Sharing LibPAS Reports

- At the top or bottom of the Report Settings window, click **Publish Report**.
- In Manage Reports (click Reports at top right) select Local - Published Reports.
- A URL and QR Code is available for each published report.

The screenshot shows the 'Report Settings' window with tabs for 'Report Settings', 'Options', 'Option Settings', and 'Format'. The 'Report Settings' tab is active, showing fields for 'Collection' (Wisconsin Public Library Annual Report), 'Period' (2014), 'Report Name' (SAMPLE 10% range of total circulation--table comparisons- Revised from template 2015-11-25), 'Description' (Shows summary library, collection, use, and financial info compared to libraries in 10% range in circulation), and 'Title' (Summary library, collection, use, and financial info). At the bottom, there are buttons for 'Run', 'Save', 'Save as New Report', and 'Publish Report'. A red arrow points to the 'Publish Report' button.

The screenshot shows the 'Published Reports' window with tabs for 'Report', 'Report Templates', and 'Published Reports'. The 'Published Reports' tab is active, displaying a table of published reports. The table has columns for 'Report Name', 'Report Type', 'Collection', 'Description', 'Updated', 'QR-Code', and 'URL'. A red arrow points to the 'Publish Report' button in the screenshot above.

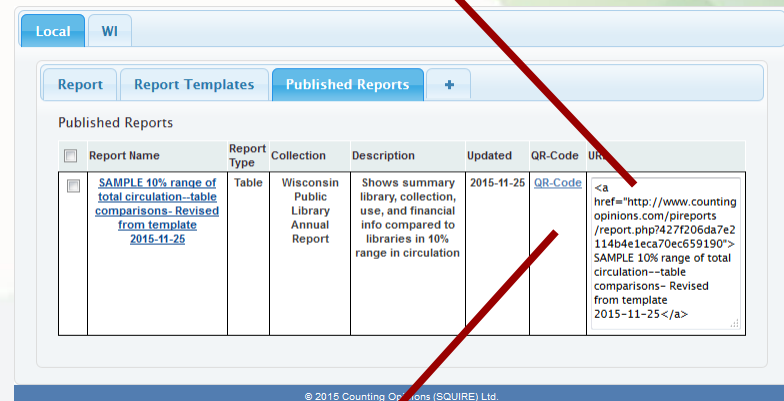
Report Name	Report Type	Collection	Description	Updated	QR-Code	URL
<a href="#">SAMPLE 10% range of total circulation--table comparisons- Revised from template 2015-11-25</a>	Table	Wisconsin Public Library Annual Report	Shows summary library, collection, use, and financial info compared to libraries in 10% range in circulation	2015-11-25		<a href="http://www.countingopinions.com/pireports/report.php7427206da7e2114b4e1eca70ec659190">http://www.countingopinions.com/pireports/report.php7427206da7e2114b4e1eca70ec659190</a>

# LibPAS Online Reporting System

## Sharing LibPAS Reports

- The “URL” is the entire HTML code to use for a link.
- The actual URL is highlighted at right.
- The QR Code link displays a graphic that phones and tablets can read to jump to the published report.

`<a href="http://www.countingopinions.com/pireports/report.php?427f206da7e2114b4e1eca70ec659190">`  
SAMPLE 10% range of total circulation--table  
comparisons- Revised from template 2016-11-25</a>



Report Name	Report Type	Collection	Description	Updated	QR-Code	URL
<a href="#">SAMPLE 10% range of total circulation--table comparisons- Revised from template 2015-11-25</a>	Table	Wisconsin Public Library Annual Report	Shows summary library, collection, use, and financial info compared to libraries in 10% range in circulation	2015-11-25	<a href="#">QR-Code</a>	<code>&lt;a href="http://www.countingopinions.com/pireports/report.php?427f206da7e2114b4e1eca70ec659190"&gt;SAMPLE 10% range of total circulation--table comparisons- Revised from template 2015-11-25&lt;/a&gt;</code>



# LibPAS – Your Turn

## Share your new report

1. Find your list of reports.
2. Open the report you created.
3. Publish it!
4. Find your list of published reports.
5. Copy the URL and paste it in a new browser tab.

# Nine Things to Remember

- Unaudited financial data is acceptable.
- Keep thorough notes for future years / staff.
- Keep all support material for attributing nonresident use and registration.
- Verify large or zero changes. *It never hurts to double check your data!*
- Multiply survey week data.
- Annual reports, including system effectiveness statements, are public records.
- Signed annual reports are due to PLD by Wednesday, March 1, 2017.
- Annual report support material is online at [dpi.wi.gov/pld/data-reports/annual-report](http://dpi.wi.gov/pld/data-reports/annual-report)
- PLD doesn't bite.

# The 2016 Annual Report: Before, During, and After South Central Library System (SCLS)

Report instructions/material: [dpi.wi.gov/pld/data-reports/annual-report](http://dpi.wi.gov/pld/data-reports/annual-report)

Counting Opinions LibPAS: [wi.countingopinions.com](http://wi.countingopinions.com)

Annual report questions: [LibraryReport@dpi.wi.gov](mailto:LibraryReport@dpi.wi.gov)

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