

Wisconsin Library and System Annual Reports: Using LibPAS

Reporting Library Activities for 2017

This document summarizes changes in the Library Performance Assessment (LibPAS) online reporting service for the current reporting year and describes how to use LibPAS for entering and submitting public library and library system annual reports.

Changes to the Online Report Form

When printing the annual report, LibPAS now asks what form to use. Choose Template to generate the PDF file that your board approves, signs, and submits. See Printing Annual Report Files on page 8.

When verifying or locking annual report data, LibPAS displays a linked list of error messages at the top of the data entry window. Click a link to jump to the field that did not pass the edit check(s). See Verifying Report Data on page 6.

Steps to Completing Annual Report Data

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

- Collect financial, service, and staff information required to complete the annual report. For additional information, see the library or system annual report instructions linked from dpi.wi.gov/pld/data-reports/annual-report.
- Use the annual report data entry worksheet to organize data in advance. Library and system worksheets are linked from dpi.wi.gov/pld/data-reports/annual-report.
- Enter data into LibPAS, printing report drafts as needed.
- Review and verify the data entered into LibPAS. Revise as necessary.
- Lock the data in LibPAS by submitting it.
- Submit signed copies of the annual report, including enclosures and attachments. For additional information, see the library or system annual report instructions linked from dpi.wi.gov/pld/data-reports/annual-report.

For additional information and resources, including complete annual report instructions, see dpi.wi.gov/pld/data-reports/annual-report.

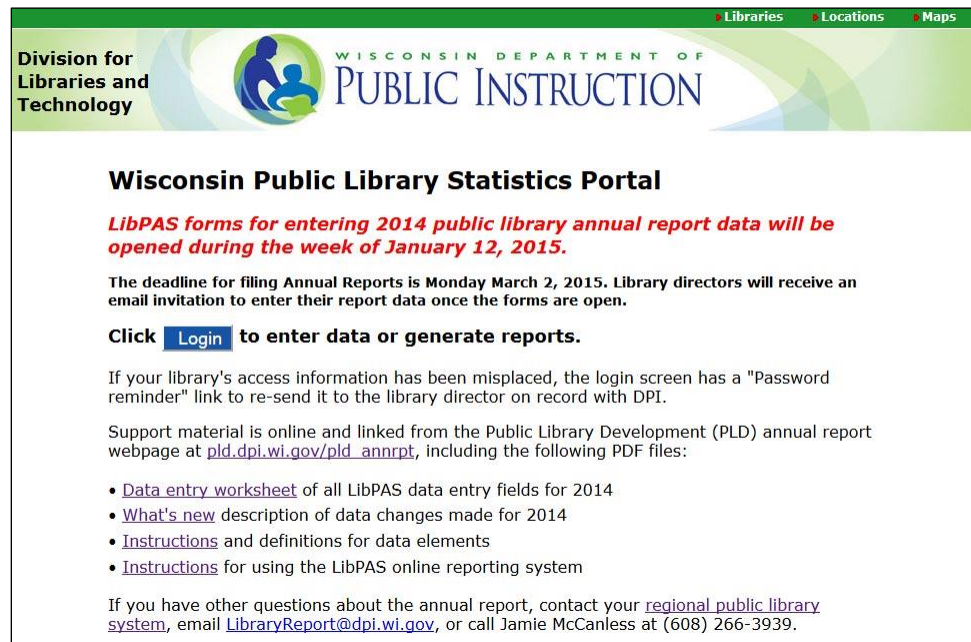
To ensure questions about LibPAS or the annual report are addressed as soon as possible, send email to LibraryReport@dpi.wi.gov.

Logging in to LibPAS

Before and during data collection, DPI sends email via LibPAS to all library and system accounts with information about the annual report. These email messages should always include the account's login information:

- Link to the LibPAS website at wi.countingopinions.com
- Account user name
- Account alphanumeric password

The LibPAS link displays Wisconsin's welcome page (shown below), which includes current announcements and links to support documents for libraries. (The annual report webpage at dpi.wi.gov/pld/data-reports/annual-report includes corresponding support document links for library systems.)



Division for Libraries and Technology

WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION

Wisconsin Public Library Statistics Portal

LibPAS forms for entering 2014 public library annual report data will be opened during the week of January 12, 2015.

The deadline for filing Annual Reports is Monday March 2, 2015. Library directors will receive an email invitation to enter their report data once the forms are open.

Click [Login](#) to enter data or generate reports.

If your library's access information has been misplaced, the login screen has a "Password reminder" link to re-send it to the library director on record with DPI.

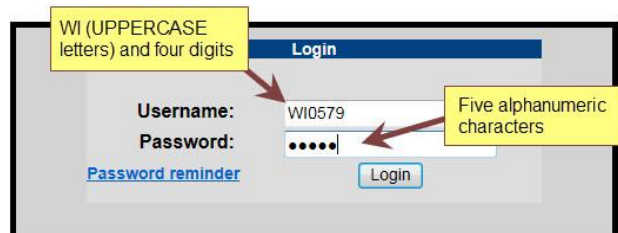
Support material is online and linked from the Public Library Development (PLD) annual report webpage at pld.dpi.wi.gov/pld_annrpt, including the following PDF files:

- [Data entry worksheet](#) of all LibPAS data entry fields for 2014
- [What's new](#) description of data changes made for 2014
- [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, or call Jamie McCaless at (608) 266-3939.

User names begin with the abbreviation for Wisconsin (WI) – not W and a one (1) or a lowercase L – and four digits that include zeros – not uppercase O; e.g., WI0456 and WI2800.

To display the Login page and log in to LibPAS, click the blue Login button on the welcome page. In the Login page, enter your username and password and click Login.



WI (UPPERCASE letters) and four digits

Five alphanumeric characters

Username: WI0579

Password: ●●●●●

[Password reminder](#) [Login](#)

Recovering Login Information

If you misplace your LibPAS username or password, you can:

- Click “Password reminder” on the Login page and enter the email address for your account. Your username and password will be sent to the email address on the LibPAS account.
- Contact your library’s system headquarters.
- Contact the DPI Public Library Development team at LibraryReport@dpi.wi.gov or Maria Ingraham at (608) 266-9534.

When you log in, LibPAS displays your library or system member page with links to the Data Input and Reports windows and status information.

Navigating the Data Input Window

The Data Input window displays annual report information for your library or system for the selected period (year). Data input forms are divided into sections. You are not required to complete the sections in any order, nor do you need to complete individual sections before moving on to other sections. Typically, there are three ways to navigate the form:

- Select the name of the section from the list at the top left of the window.
- Click Next and Previous (below the section list and at the top and bottom of the data entry form) to proceed through the form section by section.
- Click each field or use the Tab or Enter key to proceed to the next field.

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

Data Input Review Save Reset Previous Next

Collection Wisconsin Public Library Annual Report
Library Wisconsin State Public Libraries
Location
I. GENERAL INFORMATION
II. OUTLET INFORMATION
III. LIBRARY COLLECTION
IV. LIBRARY SERVICES
V. LIBRARY GOVERNANCE
VI. LIBRARY OPERATING REVENUE
VII. LIBRARY OPERATING EXPENDITURE
VIII. OTHER FUNDS HELD BY THE LIBRARY
IX. TRUST FUNDS
X. STAFF (FTE)
XI. LOANS TO NONRESIDENTS
XII. TECHNOLOGY
XIII. YOUTH SERVICES
XIV. ASSURANCE OF COMPLIANCE
XV. STATEMENT CONCERNING SY...

Review Save
Review displays all sections and questions in one long, single-page display.
This section requests basic information on corrections only as necessary.

1. Name of the Librarian
2. Public Library
3a. Head Librarian First Name
3b. Head Librarian Last Name
4. Head Librarian Title
4. Head Librarian Address

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.

« Hide

To collapse the sidebar and hide the section list, click Hide at the bottom of the list. To display the sidebar, click the » double chevron symbol at the top left of the window. To display all sections of the form, click the Review button (above the section list and at the top and bottom of the window). This is the same view that LibPAS displays when you first navigate to the Data Input window.

Data Input Review Save Reset

Collection Wisconsin Public Library Annual Report
Library Wisconsin State Public Libraries
» Location
I. GENERAL INFORMATION
II. OUTLET INFORMATION
III. LIBRARY COLLECTION
IV. LIBRARY SERVICES
V. LIBRARY GOVERNANCE
VI. LIBRARY OPERATING REVENUE
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To display the sidebar and section list, click the » double chevron.

Entering Data

Every user account has a level of access that determines which collection(s), location(s), and function(s) are available. All LibPAS accounts currently have data entry access. Each collection has an associated data input form, enabling users to enter data for report periods.

Selecting a Collection

All libraries enter report information only in the data input page of the Wisconsin Public Library Annual Report collection. Libraries with branches or bookmobiles will see a Collection dropdown list that includes the Wisconsin Public Library Outlet Data collection. Do not select the outlet collection to enter main library, library branch, or bookmobile information.

Library system users will see a Collection dropdown list that includes both the library and system annual report collections.

Selecting the Report Period

At the top of the data input form, the current collection period should be selected by default. If not, select 2016 to enter annual report information.

Data Assistance

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

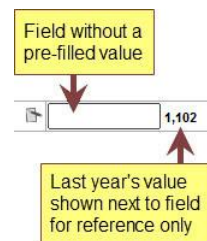
In some places the previous year's data is shown to the right of blank data entry fields *for reference only*. Reference data is not pre-filled information and is not saved as a response for the current reporting year.

To display help about what to enter in a field, click the underlined field name. LibPAS displays the Indicator Notes window with the field name, data definition, and Notes field. To enter one or more definition notes of your own, type or paste information and click Add. These notes can be used to explain where the data comes from, who can provide it, or anything else that would assist those involved in providing data this year, reviewing and approving data, or entering data in the future. Users can add as many definition notes as needed.

LibPAS does not include definition notes in annual report data. To provide supporting explanations or descriptions of information that will be saved with report data, use data notes (see Explaining Data Values on page 5).

DPI configures data fields as needed for consistency and accuracy, such as:

- Data type – defines what kind of information can be entered, such as text, integers (whole numbers), or real numbers (decimal numbers). For example, all collection numbers and dollar amounts must be integers, and staff FTEs can have one or two decimal places.
- Data length – ensures that values contain at least the minimum and no more than the maximum number of characters specified.



Checkboxes are displayed to the left of many field names. These do not change annual report data or affect form operation. You can use them to track questions you want to revisit or mark completed questions.

- Data values – are available responses shown as a dropdown list or radio buttons. Users select one.

Explaining Data Values

When libraries and systems have submitted their annual reports, DPI begins a process of reviewing and compiling data for multiple publications and purposes. This always includes contacting individual libraries and systems as needed for clarification of data.

To expedite the process, explanatory notes can be added to any data entry field. Most notes are optional, but explaining information as it is added can significantly reduce the number of follow-up questions. Other, required explanations must be made as information is entered.

Examples

- LibPAS displays the Edit Check window as soon as the library or system street address changes. The window includes the data that was just entered, last year’s value, and the reason that an explanation is required.

- Notes about the library’s home county appropriation for library service are not required. If the 2017 appropriation was identical to 2016 or changed substantially, however, adding a note may indicate to DPI the data was entered accurately and can be accepted without contacting the library.

Conditions that require explanation depend on the specific data. For example, the total number of books in print is rarely identical to the previous year, does not decrease by more than one-third, and does not increase by more than 57% of last year’s number.

To view or add notes in the PI Value Notes window, click the notes icon immediately to the left of the data entry field. Type or paste information and click Add. Users can add as many data notes as needed. When a field has one or more notes, LibPAS displays a colored icon.

Test conditions applied to data are called “edit checks.” LibPAS data fields with edit checks have a green check mark at the right of the field name.

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

Saving Data

When you leave any data entry field by pressing the Tab or Enter key or by clicking elsewhere on the webpage, LibPAS saves information in the field you left. You may briefly see a rotating “spinner” image in or near the field that shows the browser is waiting. You can also save all information displayed in the Data Input window by clicking the Save button (above the section list and at the top and bottom of the window).

Verifying Report Data

Verify (next to Submit/Lock at top right of the data entry form) runs the same edit checks that are performed when locking the report data.

When you click Verify:

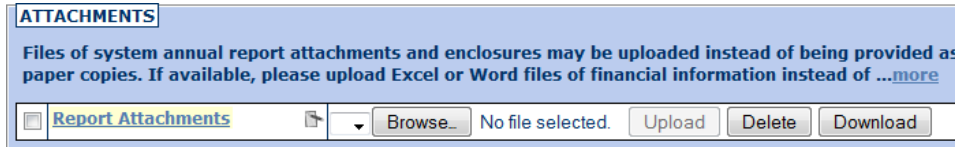
- At the top of the page, LibPAS displays a linked list of errors on a light red background. Click any message link to jump to the corresponding data field.
- Below each field that did not pass its edit check(s), LibPAS displays a row of white text on a red background below blank fields that are required and 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

DPI suggests that libraries ask systems to review their data before submitting it to DPI. The Verify edit checks can be addressed in advance of system review and submittal to DPI, minimizing delays in the review and approval process. Data changes that are made to resolve edit checks in the process of locking the data may necessitate further review by the system. Verifying report data also does not result in locking it. It is otherwise possible for libraries to inadvertently lock their data with Submit/Lock before they intended.

Attaching Files



To upload a report attachment file into LibPAS:

- Click Browse to display the File Upload window.
- Navigate to the file to attach and click Open. LibPAS displays the filename between Browse and Upload.
- Click Upload. LibPAS uploads the file and displays its name in the dropdown list next to Browse.

As many additional attachments as needed can be uploaded one at a time.

Deleting Attachments

To delete a file that has been attached to the annual report:

- In the dropdown list to the left of Browse, select the filename.
- Click Delete and confirm that you want to delete the file.

Locking and Approving Data

When annual report data has been entered, checked, and corrected, libraries and systems should use Submit/Lock to indicate that their data input process is complete. Once locked, only Data Approvers (library systems and DPI) can unlock a library's data and enable changes to data for the reporting period.

In LibPAS, the library system Approves the report data after its member library directors have locked it. DPI Approves system annual report data after the system directors have locked it. Once Approved, users cannot unlock and modify their information in LibPAS. If a change is required, only the Collection Manager at DPI can unlock the data to make changes.

If libraries need Approved report data unlocked, contact your system or send an email to your system and LibraryReport@dpi.wi.gov. If a system needs its data unlocked, contact LibraryReport@dpi.wi.gov.

For the 2017 report year, file attachments are available in the Public Library System Annual Report only.

A LibPAS status of "Approved" indicates locked report data has been examined but does not mean that signed copies of the printed annual report have been signed by the director and board president and received by DPI.

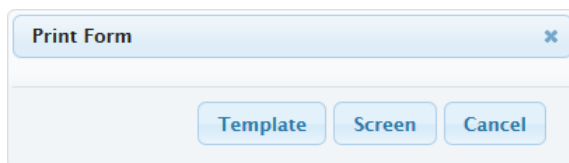
A DRAFT watermark indicates data was not locked when the report was printed and may have been altered. DPI cannot accept printed reports if any page is marked DRAFT, regardless of approval signatures.

Printing Annual Report Files

The annual report form can be printed at any time during the report process. Until the data is locked, however, the report form has a DRAFT watermark. Once data is submitted and locked, the annual report may be printed without the watermark so the director and board president can sign copies.

To generate the annual report form with data:

- Click “Print” at the top right of the LibPAS data entry page (in the green header bar). LibPAS asks what form to use to print annual report data:



- Click Template. LibPAS will compile the output PDF file, and your web browser will allow you to open or save the file.

Printing Other Documents of Report Data

LibPAS is able to merge data into Word files. DPI currently provides Word templates for two types of documents: library brochures and the library system annual report addenda.

- Log in to LibPAS and go to the Manage Reports page. (Click Reports at the top right of the window.)
- On the Manage Reports page, click the WI tab.

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.	2014-12-30
Library Brochure 2010	DOCUMENT	Wisconsin Public Library Annual Report	Custom brochure for each library to download and edit	2011-06-21
Library Brochure 2011	DOCUMENT	Wisconsin Public Library Annual Report	Custom brochure for each library to download and edit	2012-03-01
Library Brochure 2012	DOCUMENT	Wisconsin Public Library Annual Report	Custom brochure for each library to download and edit	2013-10-09
Library Brochure 2013	DOCUMENT	Wisconsin Public Library Annual Report	Custom brochure for each library to download and edit.	2014-08-14

- In the list of available documents, click the template link for the document you choose. Note that template names in the list include a report year. Each file merges LibPAS data for that year.
- When prompted, choose whether to open or save the Word file.