A Guide to Using LibPAS

DECEMBER 2019

Municipal Affairs, Government of Alberta
December 2019
A Guide to Using LibPAS

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A Guide to Using LibPAS

LibPAS is the tool utilized by Public Library Services Branch (PLSB) in collecting the information for the **Public Library Survey and Annual Report**. It is an easy-to-use, entirely Web-based utility developed by Counting Opinions. No special software is required on your computer, and the system should work with any recent Web browser, including Firefox, Chrome, and Internet Explorer.

Overview

About the Public Library Survey and Annual Report

In order to be considered eligible for operating grant funding, library boards must complete and submit the Public Library Survey and Annual Report to PLSB by **February 28** of each year.

The Public Library Survey and Annual Report is comprised of two separate parts:

1. **The Public Library Survey**: gathers public library information and includes questions about board members, meeting dates, service points and library hours. This information is used to compile a provincial directory of public libraries, to produce mailing lists and to determine compliance with provincial library legislation and regulations. Therefore, please provide current (i.e., as of the date you are filling in the report) information in this section.

2. **The Annual Report**: captures public library activity during the previous calendar year. This report documents the service activity of public library boards in Alberta and provides information on the performance of public libraries. Data on specific performance measures will be collected to produce the Public Library Statistics for the province of Alberta.

The survey and annual report is required by the Minister under the Libraries Regulation, sections 11, 15 and 20.

Steps to Completing Your Public Library Survey and Annual Report

Completing the Survey and Annual Report involves several steps, only one of which is entering the data online. The steps include:

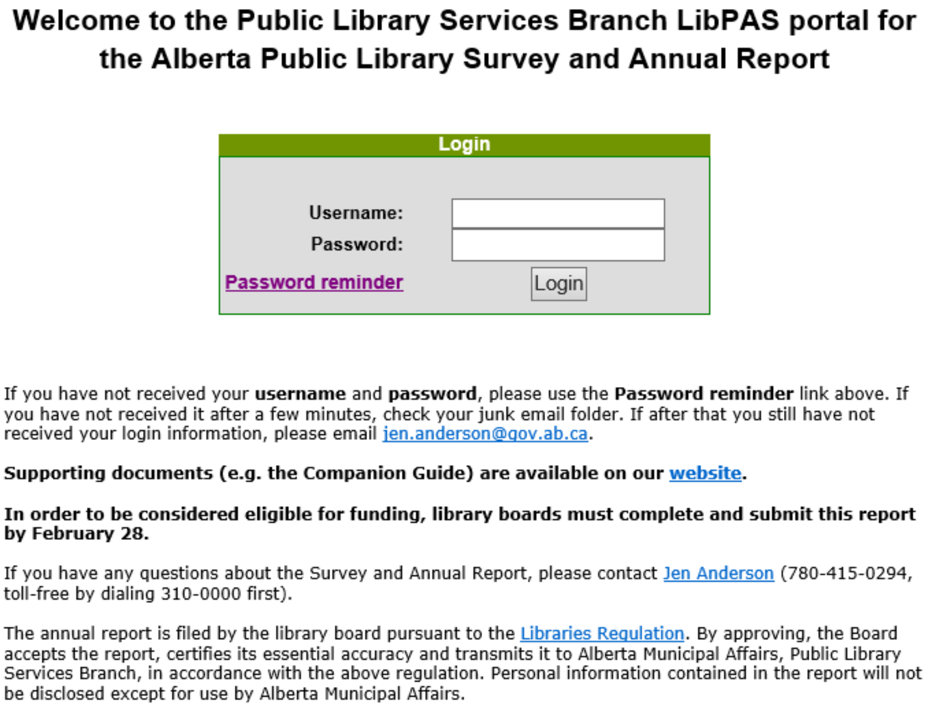
1) Collect information required to complete the Survey and Annual Report. Check https://www.alberta.ca/public-library-board-survey-and-annual-report.aspx for information and resources, and be sure to review the **Companion Guide** for detailed descriptions of each of the fields contained in the online forms in LibPAS.

2) Enter the data in LibPAS as required, print out drafts as necessary, and review the data that has been entered. When you are comfortable that the data is entered properly, present the draft to your library board for approval.

3) Once the report has been approved by the board, enter the date in the appropriate field on the report. Submit the report in LibPAS and print the report for your records. When the report is submitted, PLSB automatically receives the report.

Getting Started

Usually in December the library manager/director (or other designated respondent) will receive an email announcing when the form is ready to use. The message will include the link to access the LibPAS site (http://ab.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, and note that **passwords are only changed when there is a new respondent.**



Welcome to the Public Library Services Branch LibPAS portal for the Alberta Public Library Survey and Annual Report

If you have not received your **username** and **password**, please use the **Password reminder** link above. If you have not received it after a few minutes, check your junk email folder. If after that you still have not received your login information, please email jen.anderson@gov.ab.ca.

Supporting documents (e.g. the Companion Guide) are available on our website.

In order to be considered eligible for funding, library boards must complete and submit this report by February 28.

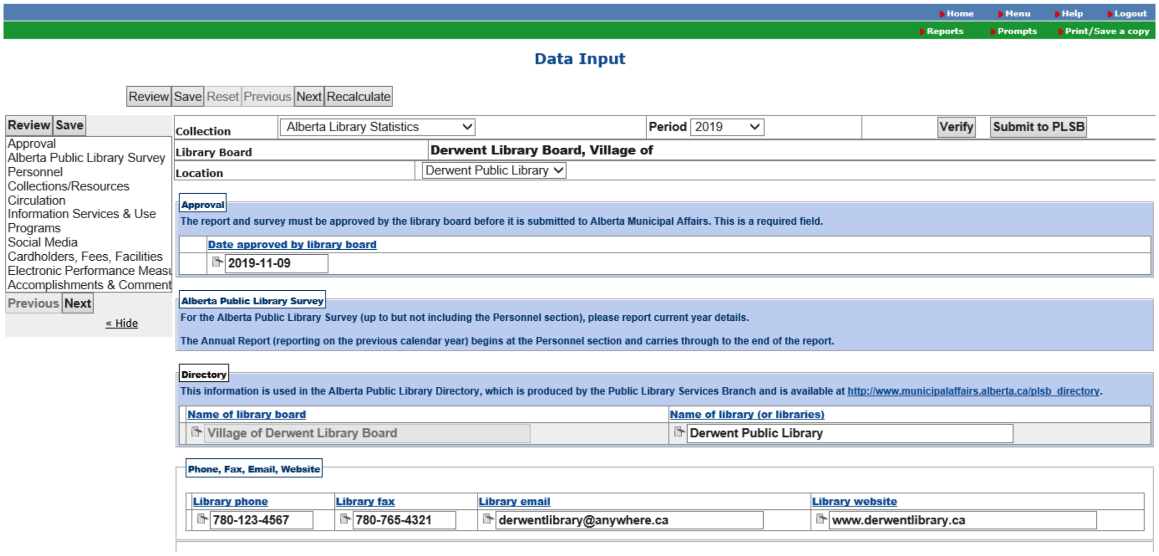
If you have any questions about the Survey and Annual Report, please contact Jen Anderson (780-415-0294, toll-free by dialing 310-0000 first).

The annual report is filed by the library board pursuant to the Libraries Regulation. By approving, the Board accepts the report, certifies its essential accuracy and transmits it to Alberta Municipal Affairs, Public Library Services Branch, in accordance with the above regulation. Personal information contained in the report will not be disclosed except for use by Alberta Municipal Affairs.

Figure 1. The LibPAS portal for Alberta.

Logging In

To log in, enter the username and password you received by email (if you do not have a username/password, or if it is not allowing you to log in, email jen.anderson@gov.ab.ca). After logging in, you will be taken directly to the **data input form** for your survey and annual report.


Home
Menu
Help
Logout
Reports
Prompts
Print/Save a copy
Review
Save
Reset
Previous
Next
Recalculate
Review
Save
Approval
Alberta Public Library Survey
Personnel
Collections/Resources
Circulation
Information Services & Use
Programs
Social Media
Cardholders, Fees, Facilities
Electronic Performance Measu
Accomplishments & Comment
Previous
Next
« Hide
Verify
Submit to PLSB

Data Input

Collection: Alberta Library Statistics

Period: 2019

Library Board: Derwent Library Board, Village of

Location: Derwent Public Library

Approval

The report and survey must be approved by the library board before it is submitted to Alberta Municipal Affairs. This is a required field.

Date approved by library board: 2019-11-09

Alberta Public Library Survey

For the Alberta Public Library Survey (up to but not including the Personnel section), please report current year details.

The Annual Report (reporting on the previous calendar year) begins at the Personnel section and carries through to the end of the report.

Directory

This information is used in the Alberta Public Library Directory, which is produced by the Public Library Services Branch and is available at http://www.municipalaffairs.alberta.ca/plsb_directory.

Name of library board	Name of library (or libraries)
Village of Derwent Library Board	Derwent Public Library

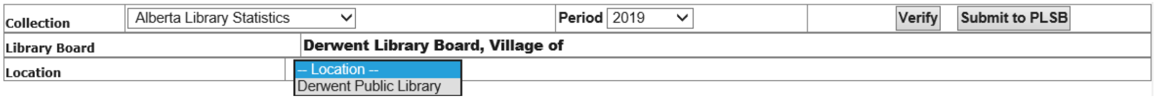
Phone, Fax, Email, Website

Library phone	Library fax	Library email	Library website
780-123-4567	780-765-4321	derwentlibrary@anywhere.ca	www.derwentlibrary.ca

Figure 2. Portal screen after logging in.

You should be presented with a screen similar to the one above showing the data input form for your library for the reporting period. The period should always reflect the previous year, e.g. in January 2020 the reporting period is 2019. You can view historical data by choosing a different year from the *Period* drop down menu.

Next, you may need to choose your location from the *Location* drop down menu. If your location is not selected (either manually or by default), you will not be able to enter any data.


Verify
Submit to PLSB
-- Location --
Derwent Public Library

Collection: Alberta Library Statistics

Period: 2019

Library Board: Derwent Library Board, Village of

Location

Figure 3. Selecting your location.

Navigating the Form

There are features to navigate and complete the data input form. Data is stored and saved as it is entered.

There are two ways to navigate through the data input form:

1) **Select the name of the section from the list on the left side of the form**. You can hide the 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 data input form, one section at a time.

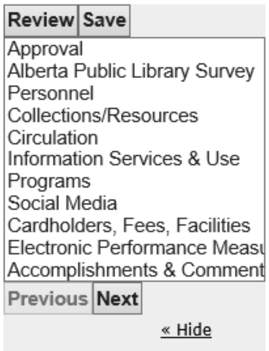
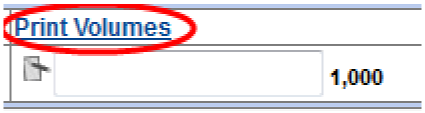

Review
Save
Approval
Alberta Public Library Survey
Personnel
Collections/Resources
Circulation
Information Services & Use
Programs
Social Media
Cardholders, Fees, Facilities
Electronic Performance Measu
Accomplishments & Comment
Previous
Next
« Hide

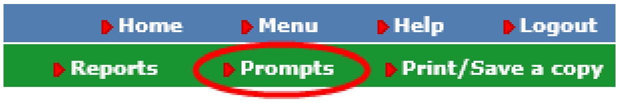
Figure 4. List of report sections, seen on the left side of the data input form.

2) **Select the *Review* button to display all the sections on one page.** Proceed through each field on the Data Input form by selecting the target field using your mouse or by using the *Tab* or *Enter* key to proceed through fields one at a time.

To see the **definition** for any field in the form, click the name of the data input field to reveal more information. (For more information see *Indicator Notes (Definitions)* on page 8).


Print Volumes
1,000

A complete list of definitions for all data fields is available by clicking the *Prompts* button at the top right corner of the form.


Home
Menu
Help
Logout
Reports
Prompts
Print/Save a copy

Entering Data

You do not have to complete the sections sequentially. Nor do you need to complete individual sections before moving on to other sections.

The data input form supports various features to ensure the quality and integrity of the data. Throughout the form, you may encounter the following:

- **Select lists** – limited set of options is presented for selection in a drop down list format. Please select the appropriate response from the selection list.
- **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, e.g. the library's address. Please always review prefilled data to ensure it is still correct.
- **Auto-calculated values** – for certain fields LibPAS will automatically calculate the value for you. These fields are greyed out and you cannot adjust them directly.
- **Previous period values** – numerical value displayed to the right of the data input field for your reference.
- **Data not available/not applicable** – a small number of fields have these options for you to indicate such.
- **Comment fields** – these boxes may be expanded by clicking in the bottom right corner and dragging it to the desired size (horizontally and/or vertically).

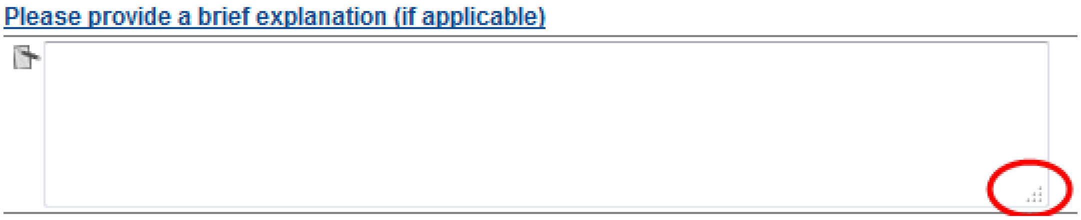


Figure 5. Expanding the comment field.

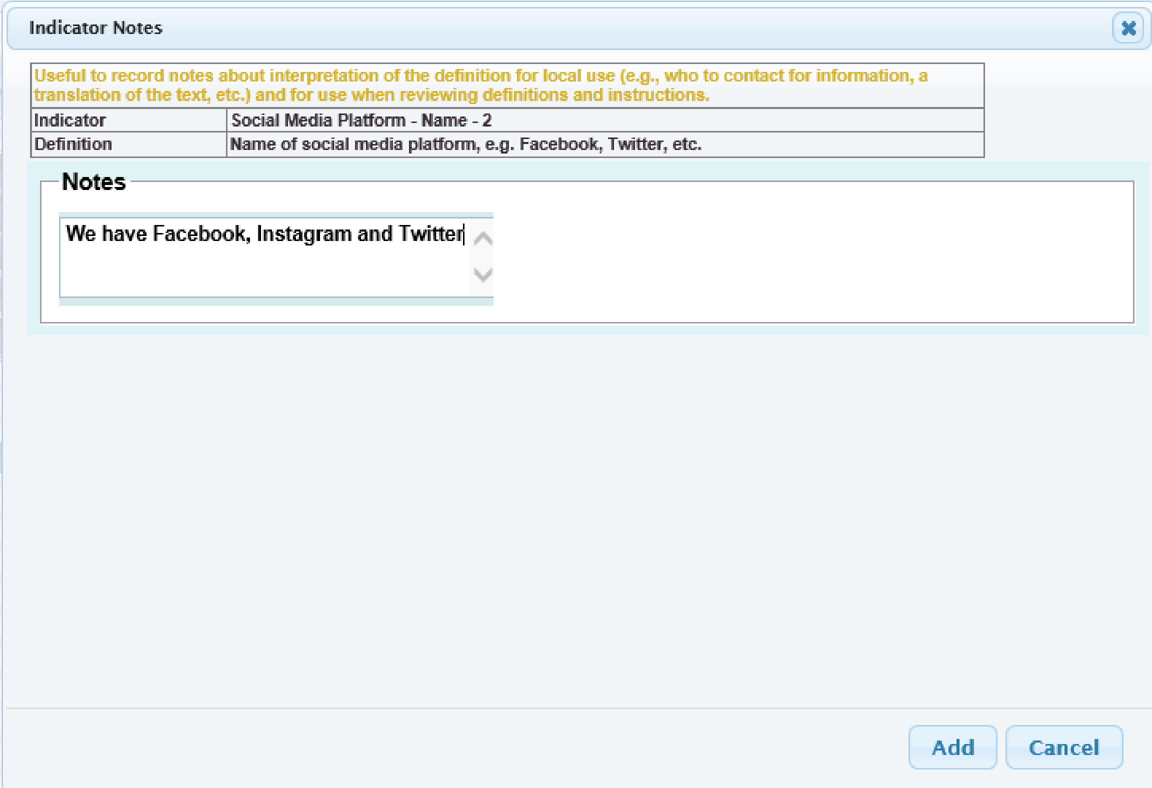
LibPAS has the ability for respondents to annotate or explain their data through the use of **notes**. There are two types of notes:

1) **Indicator notes** – typically used to capture information about the field and its definition
2) **Performance Indicator (PI) Value notes** – typically used to provide explanatory information about the data entered into the field

More information about the two types of notes is contained in the following sections.

Indicator Notes (Definitions)

By selecting the hyperlinked name of any data input field, you can view more information, including a complete definition of the data field, the expected value and other details.



Useful to record notes about interpretation of the definition for local use (e.g., who to contact for information, a translation of the text, etc.) and for use when reviewing definitions and instructions.

Indicator	Social Media Platform - Name - 2
Definition	Name of social media platform, e.g. Facebook, Twitter, etc.

Notes: We have Facebook, Instagram and Twitter

Figure 6. Indicator notes pop-up. Enter your own notes in the Notes field.

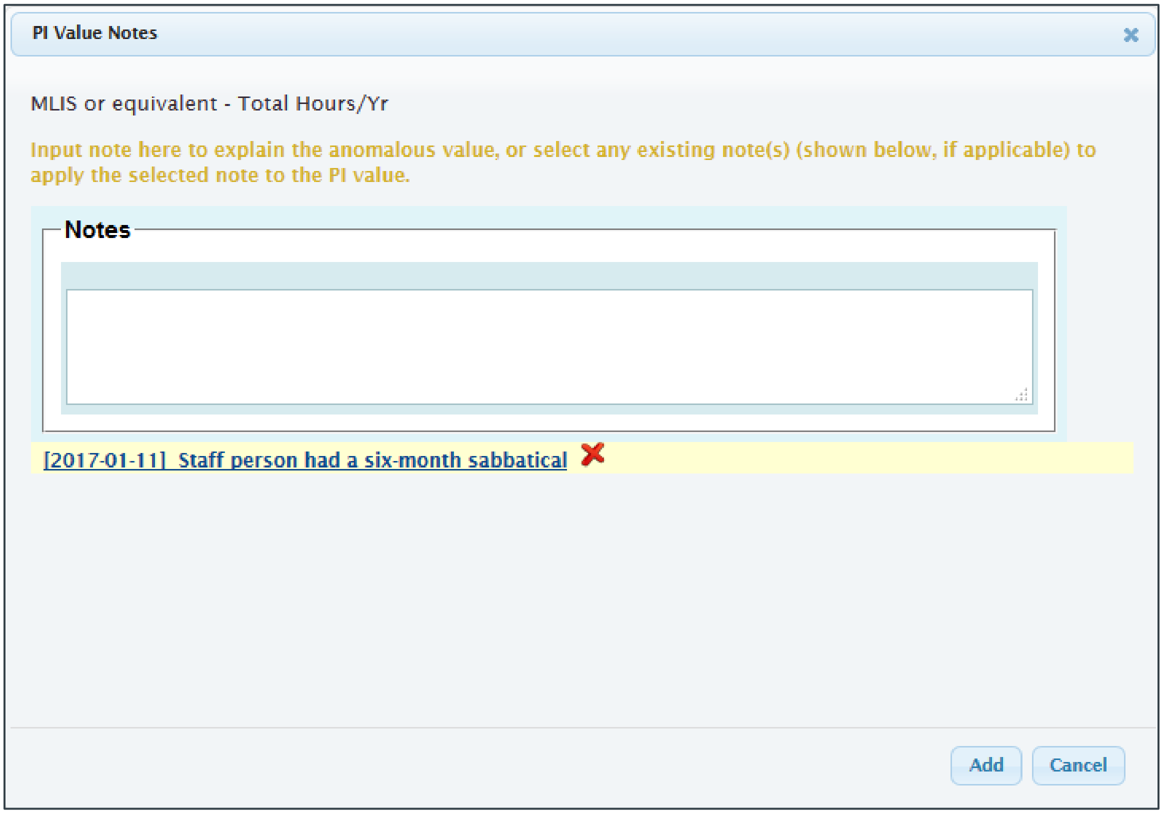
Respondents can enter notes that are helpful to them in understanding the definitions provided. For example, the notes might explain where the data comes from, what has been included in the data in the past, or anything else that would assist respondents in entering data in future years for consistency.

You can record as many notes as required. These notes are for local use only and will not be shared with other respondents.

Each note is date and timed stamped for ease of reference.

Performance Indicator (PI) Value Notes

By clicking on the *Add Notes* icon (📄) next to a field, explanations can be added to the data values.



PI Value Notes

MLIS or equivalent - Total Hours/Yr

Input note here to explain the anomalous value, or select any existing note(s) (shown below, if applicable) to apply the selected note to the PI value.

Notes

[2017-01-11] Staff person had a six-month sabbatical ✗

Figure 7. PI Value notes pop-up. Enter your own notes in the Notes field.

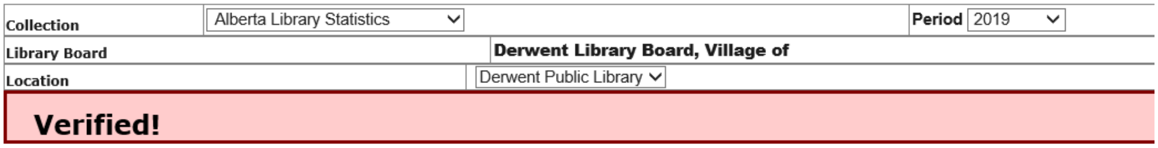
These notes are designed to help you explain or interpret the data submitted, particularly when the data is considered unusual or abnormal. For instance, when the data represents a significant change from the values previously reported.

Providing explanations is useful to those responsible for understanding the data submitted.

If there is data in a Notes field, the icon colour will change from grey (📄) to orange (📄). Notes can be deleted by clicking the red **X** beside it.

Submitting your Survey and Annual Report

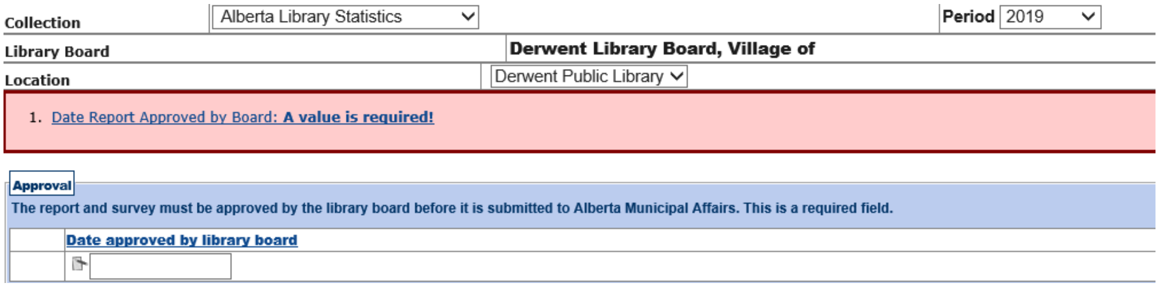
When you have completed entering in your data, click the *Verify* button at the top right of the screen next to the *Submit to PLSB* button. This will run a check that will notify you of an issues with the form.



Collection Alberta Library Statistics
Period 2019
Library Board **Derwent Library Board, Village of**
Location Derwent Public Library

Verified!

Figure 8. Data has been verified and there are no issues with the form.



Collection Alberta Library Statistics
Period 2019
Library Board **Derwent Library Board, Village of**
Location Derwent Public Library

1. Date Report Approved by Board: **A value is required!**

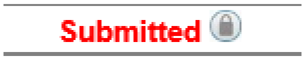
Approval

The report and survey must be approved by the library board before it is submitted to Alberta Municipal Affairs. This is a required field.

Date approved by library board

Figure 9. An issue has been detected within the form.

Once all data has been entered, verified and approved by the library board, click the ***Submit to PLSB*** button. This will lock the form, and you will see a padlock icon in the top right corner:



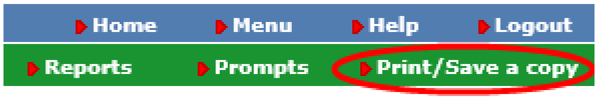
Submitted

Figure 10. The report has been submitted to PLSB and is now locked.

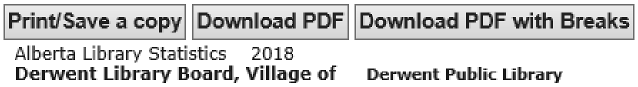
Once the form is submitted and locked, you can no longer modify data for that period, nor can you unlock the form. If a change is required, contact PLSB to unlock the form for you. If the library board has already approved the Survey and Annual Report, please ensure that the board is aware that data has been changed.

Saving and Printing

In order to save an electronic copy of your survey and annual Report, you use the same function as printing. Click on the *Print/Save a copy* link at the top right hand corner of the page in the green menu bar.


Home
Menu
Help
Logout
Reports
Prompts
Print/Save a copy

A window will appear with three options at the top:


Print/Save a copy
Download PDF
Download PDF with Breaks
Alberta Library Statistics 2018
Derwent Library Board, Village of
Derwent Public Library

Print/save a copy – clicking this will automatically bring up your print screen to print the report as it is displayed.

Download to PDF – clicking this will bring up a PDF version that you can save and that will display and print as one continuous document.

Download to PDF with Breaks – clicking this will will bring up a PDF version that you can save and that will display and print with each section (e.g. personnel, circulation, programs) as a separate page.

If you would like a paper “scratch” copy of the data input form to work with, click on the *Print/Save a copy* link in the top right hand corner in the green menu bar before you begin. This will allow you to print a blank copy. Note that you will still need to enter your data into the online form in order to submit your Survey and Annual Report.

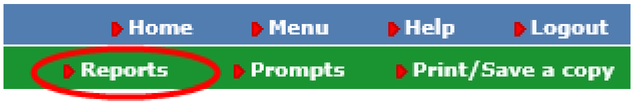
Reports

LibPAS users have access to report templates. These reports are “canned” reports, meaning that the template is static and cannot be changed.

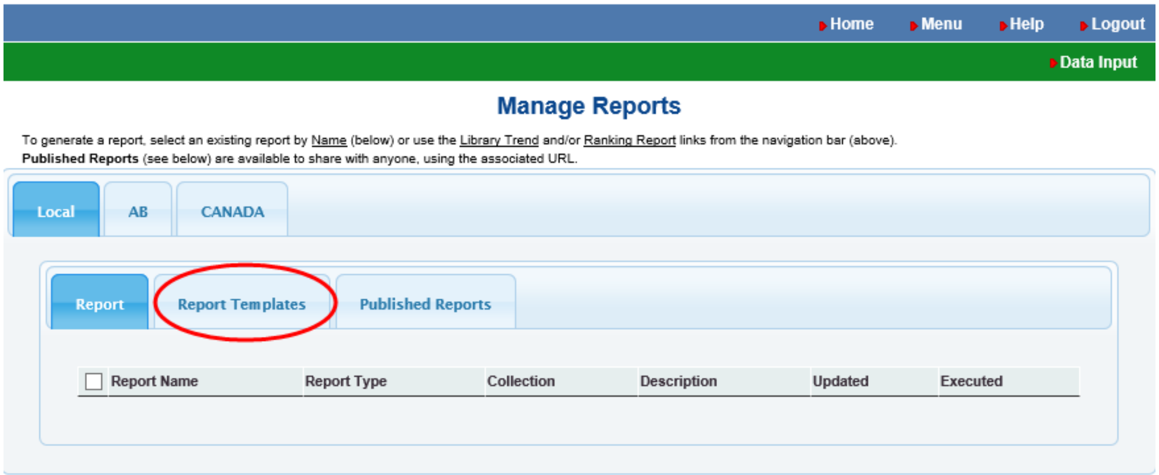
The reports bring back **raw data**. This is data that has been entered into LibPAS by the respondents and **has not been verified**. It is not considered official data, and does not constitute the public library statistics published by PLSB.

Accessing & Running Reports

To access the report templates, click on *Reports* in the top right corner in LibPAS.


Home
Menu
Help
Logout
Reports
Prompts
Print/Save a copy

This will bring you to the **Manage Reports** screen. Next, click on the *Report Templates* tab:



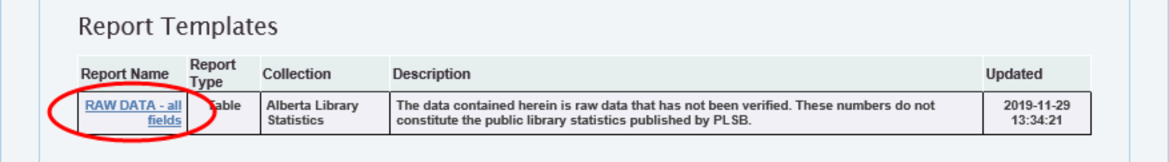
Manage Reports

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).
Published Reports (see below) are available to share with anyone, using the associated URL.

☐ Report Name	Report Type	Collection	Description	Updated	Executed

Figure 11. The Manage Reports screen. Click on Report Templates.

The list of available *Report Templates* will now appear. In the future, will be possible to develop other templates, but for now the report is set to bring back all annual report data except for comment fields. Click on the report name (e.g. *RAW DATA – all fields*) to run the report.

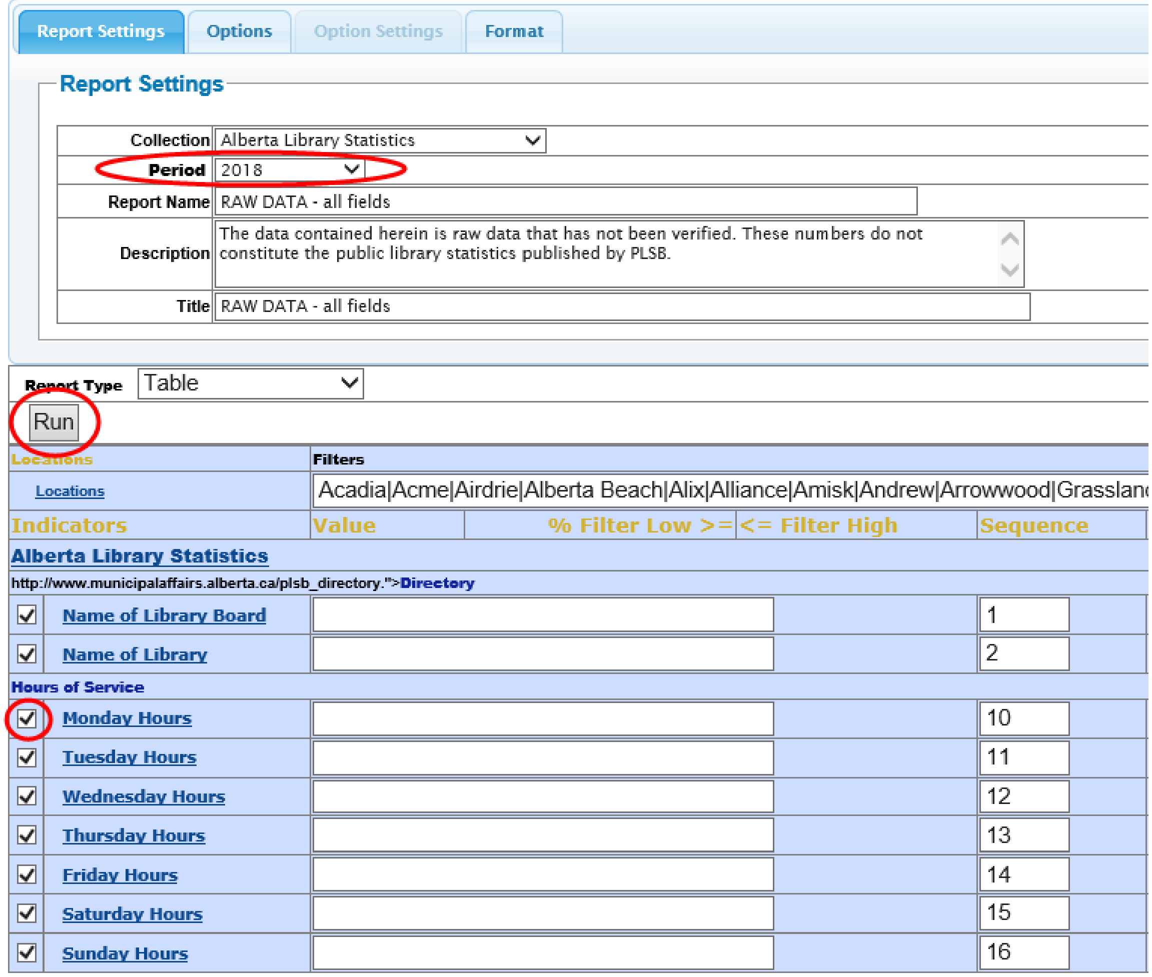


Report Templates

Report Name	Report Type	Collection	Description	Updated
RAW DATA - all fields	Table	Alberta Library Statistics	The data contained herein is raw data that has not been verified. These numbers do not constitute the public library statistics published by PLSB.	2019-11-29 13:34:21

Figure 12. Available report templates.

This will bring you to the *Report Settings* screen. Please leave the *Collection* as Alberta Library Statistics. From here you can choose the *Period* you wish to run the report for. Note that LibPAS data does have data prior to 2010.



Report Settings

Collection	Alberta Library Statistics
Period	2018
Report Name	RAW DATA - all fields
Description	The data contained herein is raw data that has not been verified. These numbers do not constitute the public library statistics published by PLSB.
Title	RAW DATA - all fields

Report Type: Table

Locations	Filters
Locations	Acadia|Acme|Airdrie|Alberta Beach|Alix|Alliance|Amisk|Andrew|Arrowwood|Grasslan

	Indicators	Value	% Filter Low >=	<= Filter High	Sequence
	Alberta Library Statistics				
	http://www.municipalaffairs.alberta.ca/plsb_directory.">**Directory**				
☑	Name of Library Board				1
☑	Name of Library				2
	Hours of Service				
☑	Monday Hours				10
☑	Tuesday Hours				11
☑	Wednesday Hours				12
☑	Thursday Hours				13
☑	Friday Hours				14
☑	Saturday Hours				15
☑	Sunday Hours				16

Figure 13. The Report Settings screen.

The blue section of the screen below the *Report Settings* options indicates all the locations and fields that will bring back data when you run the report.

All **locations** that are currently active and contain data are selected as default. You cannot deselect locations by clicking on the *locations* hyperlink. When the results are exported to Excel you can delete the locations you do not want the data for.

All **Indicators** (fields) listed are also selected by default. You can customize the results by unchecking the fields you do not want data for at this time.

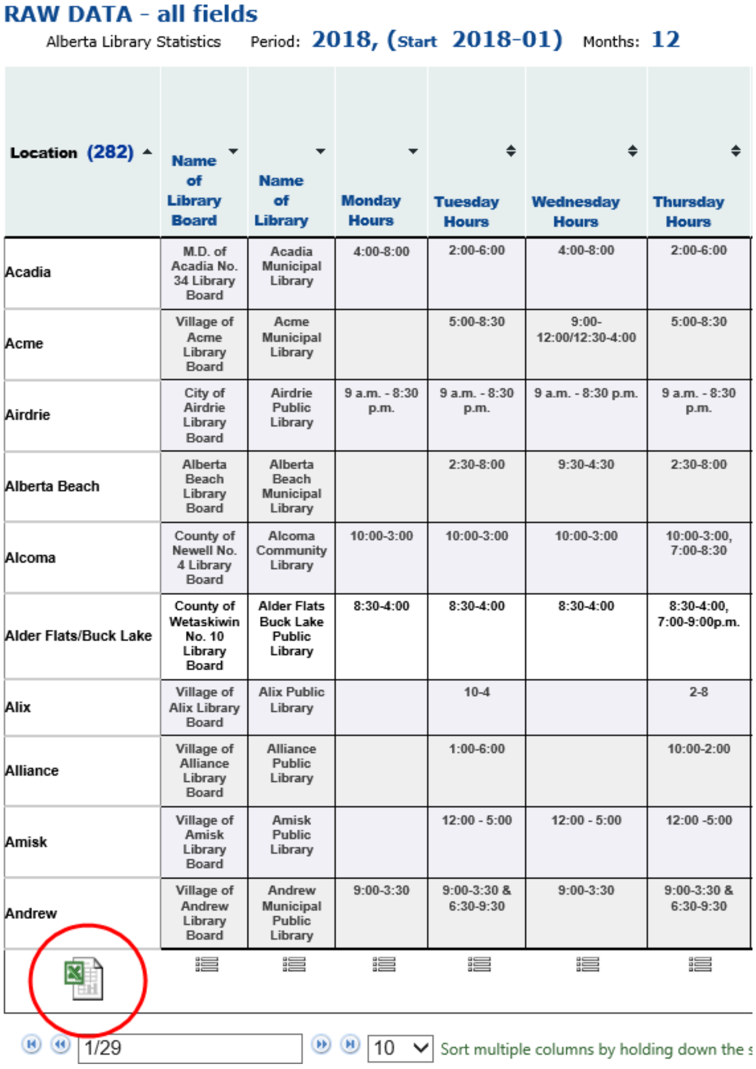
When you are ready, click ***Run***.

The report can take a few minutes to generate, and will automatically display the data in a web version. Click on the *Excel icon* at the bottom of the results to download the spreadsheet.

When you click on the *Excel icon* you may receive a prompt about the file format and extension not matching. You can can click *Yes* to continue.

Click on *Enable Editing* at the top of the spreadsheet to sort and view the data.

If you are saving the spreadsheet, it will default to save as an XML Spreadsheet 2003. You may wish to change it to an Excel Workbook file extension.



RAW DATA - all fields

Alberta Library Statistics Period: **2018, (Start 2018-01)** Months: **12**

Location (282)	Name of Library Board	Name of Library	Monday Hours	Tuesday Hours	Wednesday Hours	Thursday Hours
Acadia	M.D. of Acadia No. 34 Library Board	Acadia Municipal Library	4:00-8:00	2:00-6:00	4:00-8:00	2:00-6:00
Acme	Village of Acme Library Board	Acme Municipal Library		5:00-8:30	9:00-12:00/12:30-4:00	5:00-8:30
Airdrie	City of Airdrie Library Board	Airdrie Public Library	9 a.m. - 8:30 p.m.	9 a.m. - 8:30 p.m.	9 a.m. - 8:30 p.m.	9 a.m. - 8:30 p.m.
Alberta Beach	Alberta Beach Library Board	Alberta Beach Municipal Library		2:30-8:00	9:30-4:30	2:30-8:00
Alcoma	County of Newell No. 4 Library Board	Alcoma Community Library	10:00-3:00	10:00-3:00	10:00-3:00	10:00-3:00, 7:00-8:30
Alder Flats/Buck Lake	County of Wetaskiwin No. 10 Library Board	Alder Flats Buck Lake Public Library	8:30-4:00	8:30-4:00	8:30-4:00	8:30-4:00, 7:00-9:00p.m.
Alix	Village of Alix Library Board	Alix Public Library		10-4		2-8
Alliance	Village of Alliance Library Board	Alliance Public Library		1:00-6:00		10:00-2:00
Amisk	Village of Amisk Library Board	Amisk Public Library		12:00 - 5:00	12:00 - 5:00	12:00 -5:00
Andrew	Village of Andrew Library Board	Andrew Municipal Public Library	9:00-3:30	9:00-3:30 & 6:30-9:30	9:00-3:30	9:00-3:30 & 6:30-9:30

Figure 14. Default preview of the results of the report

Contact PLSB

If you have any questions or comments about LibPAS, please contact **Jen Anderson** by email at jen.anderson@gov.ab.ca or by calling 780-415-0294 (toll free by dialing 310-000 first).