



# 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 Edge.

## 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

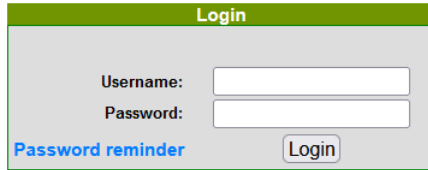
Completing the Survey and Annual Report involves several steps, only one of which is entering the data online. The steps include:

1. Collect information required to complete the Survey and Annual Report. Check the [PLSB website](#) for information and resources, and be sure to review the **Reference Key** (formerly called “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

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 website](http://ab.countingopinions.com) (<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 [libraries@gov.ab.ca](mailto:libraries@gov.ab.ca).

**Supporting documents (e.g. the Reference Key) 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 Public Library Services Branch at [libraries@gov.ab.ca](mailto:libraries@gov.ab.ca) (780-427-4871, toll-free by dialing 310-0000 first).

The survey and 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 [libraries@gov.ab.ca](mailto:libraries@gov.ab.ca)). After logging in, you will be taken to the **data input form** for your survey and annual report.

Collection: AB Library Statistics | Period: 2022 | Verify | Submit to PLSB

Library Board: Derwent Library Board, Village of

Location: Derwent

Review Save Reset

AB Library Statistics | Survey Report | Annual Report

**AB Library Statistics**

**Survey Report** - This tab contains the Alberta Public Library Survey. It is to be filled in with **current** information, up to and including the Board Governance - Board Members section. All municipal and intermunicipal library boards are required to complete this report.

**Annual Report** - This tab contains fields to capture statistical data for the reporting year for each library service point the board operates. If the board does not operate a service point, the Annual Report fields will not be visible. Urban library boards with multiple branches in the same city are excluded from this and can report aggregate data.

close

Review Save Reset | Save Submit to PLSB

Figure 2. Data input screen after logging in.

You should be presented with a screen similar to Figure 2 showing the data input form for your library board for the reporting period. The period should always reflect the previous year, e.g., in January 2023 the reporting period is 2022. Typically, you can view historical data by choosing a different year from the *Period* drop down menu. However, as we have had to make a new data input form from scratch, data prior to 2022 is only available upon request. Going forward in the new form, previous years' data after 2022 will be available by using the period dropdown box.

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.

Collection: AB Library Statistics | Period: 2022 | Verify | Submit to PLSB

Library Board: Derwent Library Board, Village of

Location: Derwent

Review Save Reset

AB Library Statistics | Survey Report

-- Location --  
Derwent

Figure 3. Selecting your location.

# Navigating the Data Input Form

When you log in you will see three tabs.

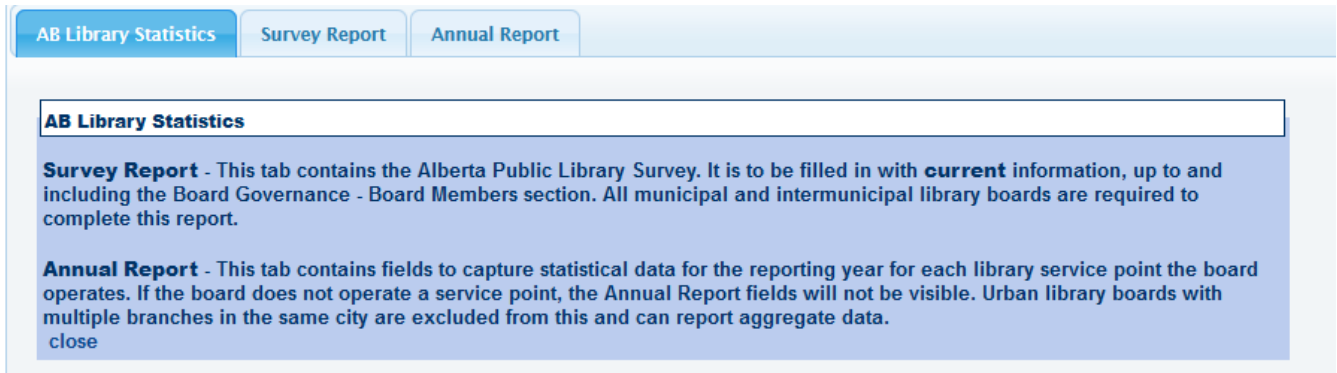


Figure 4. The three tabs that make up the data input form.

**AB Library Statistics tab** – This tab provides an overview of the two other tabs.

**Survey Report tab** – This tab contains the Alberta Public Library Survey. It is to be filled with current information, up to and including the *Board Governance – Board Members* section.

However, if your library board operates multiple services points, or if your board does not operate a service point, you will also see the *Board Governance* section after the *Board Governance – Board Members* section. This *Board Governance* section asks for information about board meetings held and board volunteer hours for the reporting year, i.e., the previous calendar year.

The fields in the Survey Report tab will only be visible for library boards that do not operate a library, those that operate one library and library boards that operate multiple libraries. Library system service point libraries will not see the fields in this tab.

For those boards that operate multiple libraries, there will be a location instance for the library board and one for each of the libraries. The library board location has access to the Survey Report tab, while each library will have access to the Annual Report tab to report data for their specific location. Urban library boards with multiple branches in the same city are excluded from this and can report aggregate data.

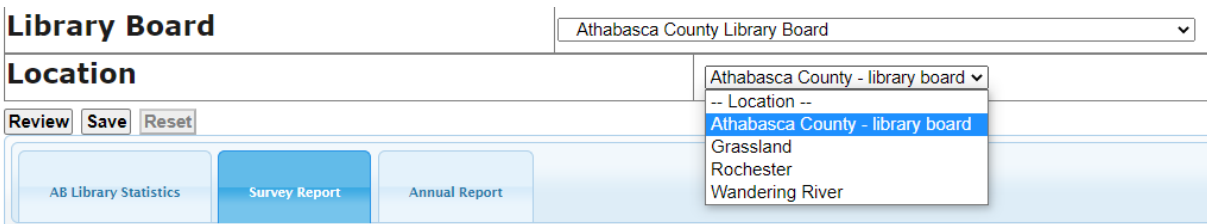


Figure 5. Library boards that operate multiple libraries.

**Annual Report tab** – This tab contains fields to capture primarily statistical data for the reporting year for each library operated by the board. If a library board does not operate a service point the Annual Report tab will not display the fields.

# Entering Data

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

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 dropdown 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 name of the library. 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** – some fields have these options for you to indicate such. If you are unable to put a check in the data not available or not applicable box, make sure there is not a value (e.g., a “0”) in the associated field. If there is, deleting the value should allow you to put a check in the box.
- **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). Please do not paste from a Word document into these fields.

Please provide a brief explanation (if applicable)



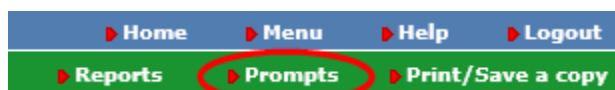
Figure 6. Expanding the comments field.

# Definitions

To see the **definition** for any field in the form, click the hyperlinked name of the data input field to reveal more information. (For more information see *Indicator Notes (Definitions)* on page 9).



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





# Annotations

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

## Indicator Notes (for Definitions)

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

Indicator	Board volunteer hours
Definition	Please note the amount of time board members volunteer on library board business, e.g. board meetings, committee meetings, etc. (Any volunteer work in the library by board members should be recorded in the "Personnel - Volunteers" section).

Notes

Get this information from the board chair

Add Cancel


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

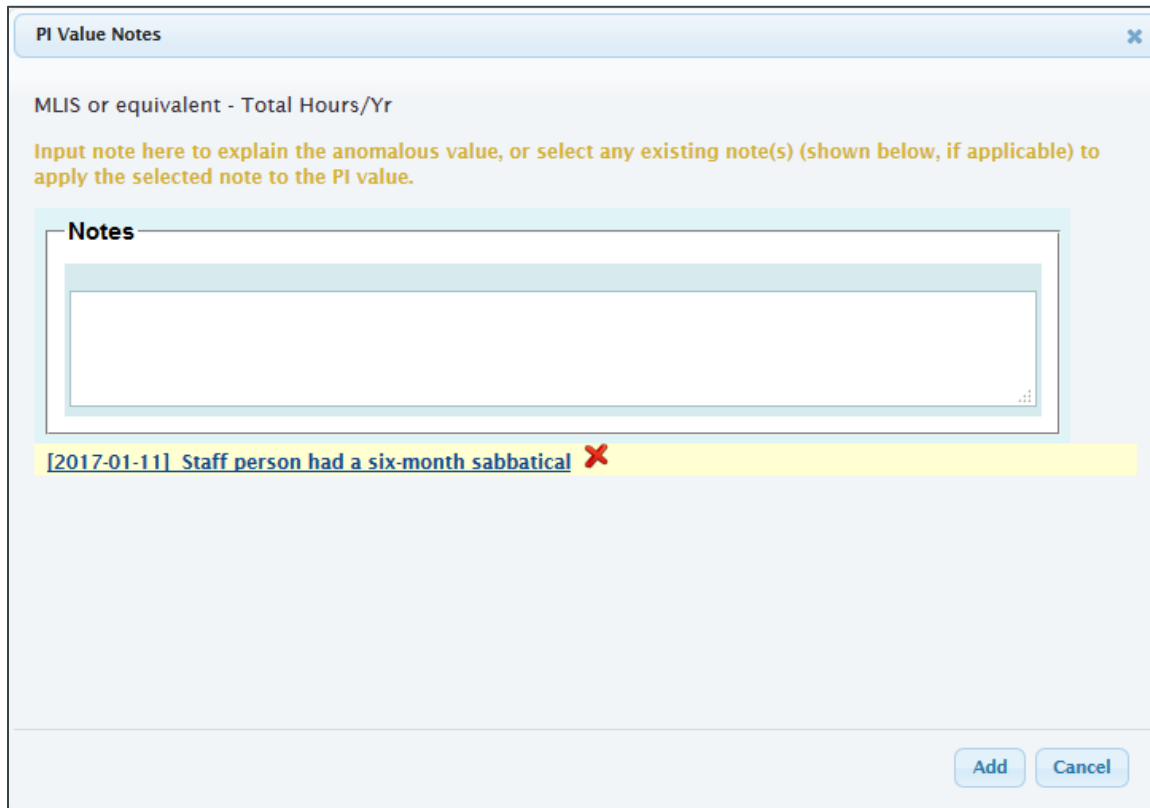
Respondents can enter notes that are helpful to them in understanding the definitions provided. For example, the notes might explain where the data comes from, what has been included in the data in the past, or anything else that would assist respondents in entering data in future years for consistency.

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

Each note is date and time 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 

Add Cancel

Figure 8. 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 Public Library Services Branch to understand the data being 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 any issues with the form.

Collection	AB Library Statistics	Period	2022	Verify	Submit to PLSB
Library Board	Derwent Library Board, Village of				
Location	Derwent				
<b>Verified!</b>					

Figure 9. Data has been verified and there are no issues with the form.

Collection	AB Library Statistics	Period	2022	Verify	Submit to PLSB
Library Board	Derwent Library Board, Village of				
Location	Derwent				
1. Date report approved by library board: <b>A value is required!</b>					

Figure 10. 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**.

**For municipal and intermunicipal library boards that operate a single library**, if you click *Submit to PLSB* in the Survey tab, it will also submit the Annual Report tab. And similarly, if you click submit on the Annual Report tab, it will also submit the Survey tab. Therefore, please ensure that you are only clicking *Submit to PLSB* once all data in both tabs has been entered, verified and approved by the library board.

**For library boards that operate multiple libraries, each library location needs to be submitted.** Submitting just the Survey portion of the report is not sufficient.

Clicking *Submit to PLSB* will **lock** the form and you will see the word “Received” with a check mark in the top right corner.

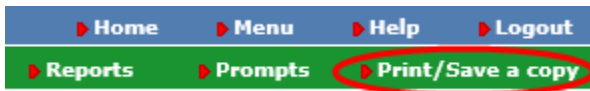
**Received** ✓

Figure 11. The report has been submitted and is now locked.

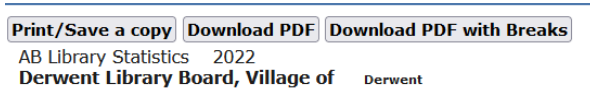
**Once the form is submitted and locked, you can no longer modify data for that period, nor can you unlock the form.** If a change is required, contact PLSB to unlock the form for you. Since the library board has already approved the Survey and Annual Report, please ensure that the board is aware that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



A window will appear with three options at the top – Print/save a copy, Download PDF and Download PDF with Breaks.



**Print/save a copy** – clicking this will automatically bring up your print screen to print the report as it is displayed. NOTE: This option is not working optimally as of December 2022, so we recommend using Control +P from the data input screen in lieu of this option.

**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 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.



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

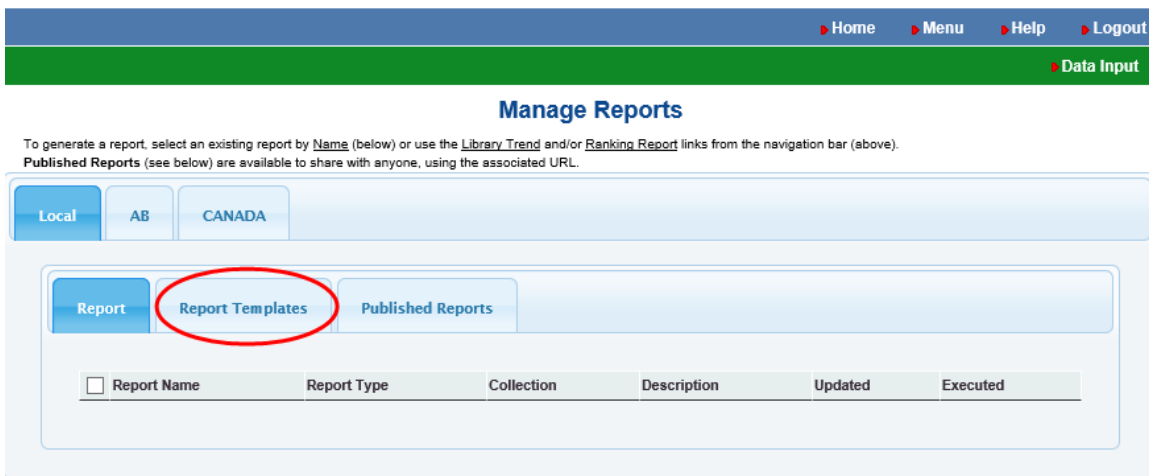


Figure 4. The Manage Reports screen. Click on Report Templates.

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.



Figure 13. 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 does not 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

**Run**

**Locations**  
 Locations: Acadia|Acme|Airdrie|Alberta Beach|Alix|Alliance|Amisk|Andrew|Arrowwood|Grassland

**Indicators**

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

Figure 14. 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 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



1/29    10    Sort multiple columns by holding down the s

Figure 15. Default preview of the results of the report.

## Contact PLSB

If you have any questions or comments about LibPAS, please contact **Public Library Services Branch** by email at [libraries@gov.ab.ca](mailto:libraries@gov.ab.ca) or by calling 780-427-4871 (toll free by dialing 310-000 first).