

## INSTRUCTIONS FOR SUBMITTING ARL STATISTICS DATA ONLINE

### Overview

The ARL Statistics Web interface facilitates entry of survey data, automatically performs many required math functions, and generally provides for simpler, faster, and more accurate submission of data to ARL. The website has been updated this year to leverage new technology as well as clarify the data submission process. Below is a general overview of this process:

**Step 0:** Defining system users and reporting branches for your institution

**Step 1:** Survey Set-up: designating reporting branches for the different surveys, data entry rights for users, and branch inclusion for each publication

**Step 2:** Entering your Data

**Step 3:** Reviewing your Data

**Step 4:** Submitting your Data

For the survey submittal process, there are two classes of individuals: Primary Contacts and Users. These are defined below.

- **Primary Contact** – an institution’s designated point person for a particular survey (ARL Statistics, Preservation Statistics or Supplementary Statistics). This person is exclusively responsible for the completion of steps 0, 1, 3, and 4 of the submittal process outlined above. These individuals should read this document in its entirety. The system is launched so the primary contact is the same for all surveys.
- **Users** – these are all other members of an institution’s staff who are involved in the data submittal process. These individuals are only involved in step 3 of the submittal process. Users should read the General Instructions in the next section and then can skip to the section on data entry (pg 5).

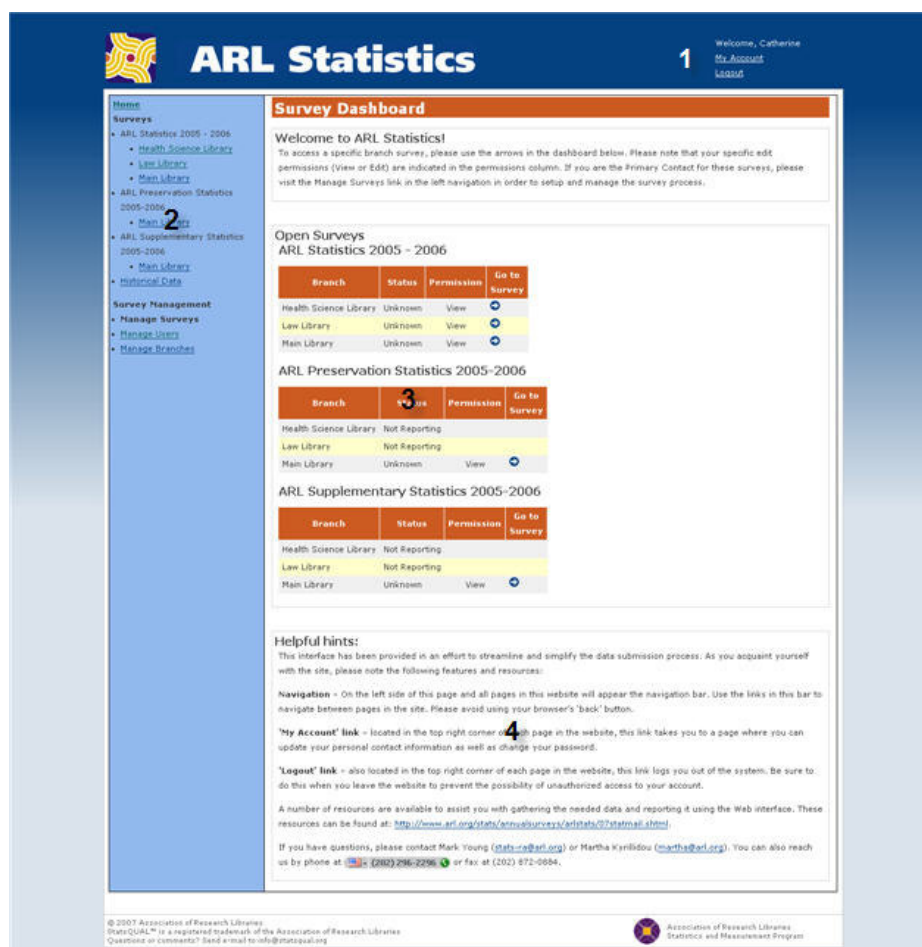
### General Instructions

#### Login

- Point your browser to [www.arlstatistics.org](http://www.arlstatistics.org) and login.
- Enter your Username (e-mail address) and password. Note: click on the box to store your user name and password on the computer you are using, automatically populating the username and password boxes when you return to the login page. Only check this box if you login from your own private computer.
- **If you have forgotten your password**, please click on ‘Forgot your password?’. You are prompted for your e-mail address. Enter it in the space provided and

click 'Submit'. If your email is in the database, you will receive an email to reset your password. If the system returns the message "User does not exist" or if you do not receive an e-mail promptly, please contact the ARL Statistics and Measurement staff at 202-296-2296.

## Homepage & Site Features



**1** Welcome, Catherine  
My Account  
Logout

**2**

**3**

**4**

**Survey Dashboard**

Welcome to ARL Statistics!  
To access a specific branch survey, please use the arrows in the dashboard below. Please note that your specific edit permissions (View or Edit) are indicated in the permissions column. If you are the Primary Contact for these surveys, please visit the Manage Surveys link in the left navigation in order to setup and manage the survey process.

**Open Surveys**  
ARL Statistics 2005 - 2006

Branch	Status	Permission	Go to Survey
Health Science Library	Unknown	View	↕
Law Library	Unknown	View	↕
Main Library	Unknown	View	↕

**ARL Preservation Statistics 2005-2006**

Branch	Status	Permission	Go to Survey
Health Science Library	Not Reporting		
Law Library	Not Reporting		
Main Library	Unknown	View	↕

**ARL Supplementary Statistics 2005-2006**

Branch	Status	Permission	Go to Survey
Health Science Library	Not Reporting		
Law Library	Not Reporting		
Main Library	Unknown	View	↕

**Helpful hints:**  
This interface has been provided in an effort to streamline and simplify the data submission process. As you acquaint yourself with the site, please note the following features and resources:  
**Navigation** - On the left side of this page and all pages in this website will appear the navigation bar. Use the links in this bar to navigate between pages in the site. Please avoid using your browser's 'back' button.  
**'My Account' link** - located in the top right corner of each page in the website, this link takes you to a page where you can update your personal contact information as well as change your password.  
**'Logout' link** - also located in the top right corner of each page in the website, this link logs you out of the system. Be sure to do this when you leave the website to prevent the possibility of unauthorized access to your account.  
A number of resources are available to assist you with gathering the needed data and reporting it using the Web interface. These resources can be found at: <http://www.arl.org/stats/announcements/arlstats/2/statmail.shtml>.  
If you have questions, please contact Mark Young ([stats@arl.org](mailto:stats@arl.org)) or Martha Kyriakidou ([martha@arl.org](mailto:martha@arl.org)). You can also reach us by phone at: [202-296-2296](tel:2022962296) or fax at (202) 872-0884.

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Statistics and Measurement Program


**(1) - Top right:** This section of the page features links to pages where you can manage "My Account" and "Logout".

**(2) - Left Navigation Bar:** Used to navigate throughout the site. Use of your browser's back button should be avoided. The navigation bar is divided into three main sections:

- **Home** - returns you to the 'Survey Dashboard' page from any place in the site. The "ARL Statistics" logo at the top of each page also performs this function.
- **Surveys** - contains sub-headers for each of the statistics publications under which there are links to data entry forms for each branch reporting data in

that publication. If this section contains no links, your institution's primary contact has not completed the survey set-up process and you should wait for further instructions or contact them directly. Present are links to summaries and survey forms from previous surveys ("Historical Data") and ARL Index files.

- **Survey Management** - Available only to primary contacts, this section lists links to survey set-up and management tools for each of your assigned surveys.

(3) - Survey Dashboard. Highlights the data entry forms that need your attention ("My Rights" setting of 'Edit') and provides access to the form via the  icon. Forms with a "My Rights" setting of 'View' can also be accessed, but not edited. These rights are set by the primary contact at the time of survey set-up.

(4) - This section contains a few helpful tips on the features of the website as well as a link to the documents (worksheets and instructions) included in the survey mailing.

## Instructions for Primary Contacts

### Step 0: Defining system users and reporting branches for your institution

The following links (located under 'Survey Management' in the navigation bar) need to be reviewed at the start of the survey period:

*Manage Users* - Review the branches listed for use in submitting your 2006/07 data (they are the same as used in your 2005/06 data).

- *To change a branch's name or type*, make the change to the appropriate field and click 'Save'.
- *To add a branch*, click the "Add Branch" button and enter the new information. Commit your changes by clicking 'Save'.
- *To deactivate a branch*, remove the check from the box in the 'Active' column for that branch and click 'Save'.

Note that a branch's 'type' does not automatically determine its placement within the statistics publications. You will explicitly indicate the inclusion of branch data for publication purposes at the survey set-up step.

*Manage Users* (located under 'Survey Management' in the navigation bar). Review the users who have access to the ARL Statistics data entry system for your institution.

- *To edit a user's contact information*, click 'Edit' next to the person's name.
- *To add a new user*, click 'Invite a new user' and enter the e-mail of the user you wish to add. An e-mail will be sent to this individual with instructions on how to complete their registration.

*The remainder of the survey process can be completed and monitored from the links under the 'Manage Surveys' sub-header in the navigation bar. Click on each survey link to complete the following steps:*

**Step 1: Survey Set-up: designating reporting branches, data entry rights for users, and branch publication inclusion for each survey**

Follow the directions given for each part. In this step you designate the branches reporting data, the user rights for each branch and the data included in each publication (relevant for ARL Statistics, ARL Academic Health Sciences, or ARL Academic Law). Note that each part needs to be completed in sequence in order to move to the next step.

**Step 2: Entering your Data**

Once you complete step 1, the system automatically displays a monitoring page for this survey. You are able to see the status of each reporting branch as well as browse to the branch form. Use this page to manage/monitor the data entry process for this survey at your institution. Once all branch forms have been completed and placed in a status of 'Review' (by clicking the 'Ready for Review' button at the bottom of each form), the 'Continue to Review' button on the monitoring page will become active. Click this button to continue to step 3.

**Step 3: Reviewing your Data**

In step 3, you are presented with a summary page which compares the aggregate values of reporting branches for this year with what you reported last year and the percent of change. Use this step to ensure that your values are reasonable and that any large fluctuations between this year and last are understood and explained in the appropriate footnotes. **Note that this is your last opportunity to ensure your data are correct and that you indicated the inclusion of branch data as you intended.** You have separate tabs for a footnote summary (all surveys) as well as for the Academic Health Sciences and Academic Law publications (ARL Statistics survey only). When you are satisfied with the values displayed, click the 'Submit' button at the bottom of the page to submit your data to ARL. You will be given an opportunity to abort the submittal if you accidentally click this button. To return to the summary without submitting the data, click 'Cancel' on the pop-up dialogue box displayed. Otherwise, click 'OK'.

**Step 4: Submitting your Data**

Once you see '**Step 4) Survey Complete**' displayed at the top of this page, you have successfully submitted your data to ARL and the surveys are now closed. No further edits can be made but you will still be able to access the branch forms and summaries if needed. If you need to make corrections to your data after reaching this step, you will need to contact the Statistics and Measurement staff to make these changes at 202-296-2296 or [stats-ra@arl.org](mailto:stats-ra@arl.org).

## Instructions for Users (data entry personnel)

From the home page, links to survey forms for each reporting branch are available from the navigation bar on the left of your screen as well as from the survey dashboard. You may edit forms if designated with those rights by your institution's primary contact ('My Right' setting of 'Edit'). On each branch form, note the following features:

**ARL Statistics**

Welcome, Gary  
[My Account](#)  
[Logout](#)

**ARL Statistics 2006 - 2007**  
You can only view this survey.

Please enter the data values for each question in the form below. **If you do not click on a "Save" button, any data you entered will not be saved and will not be available the next time you log onto your institution's survey.** When you have completed all the data for this branch, please click Ready for Review after saving your data. You can access these forms as often as necessary, updating your data each time you visit.

Questions that have additional instructions may be accessed by clicking on the "i" icon next to the question. To enter a footnote for a particular question, select the footnote icon on the appropriate row. General footnotes are found at the very end of this form.




**Key:**  
i Click for information on a particular question or survey.  
+ Add a new footnote to a question.  
- Edit an existing footnote.

Question	Response	N/A	U/A
<b>Volumes</b>			
1) Volumes held June 30, 2007. ( 1.a + 1.b )	<input type="text" value="1"/>	NA/UA	<input type="text" value="2"/> <input type="text" value="4"/>
a) Volumes held as of June 30, 2006.	<input type="text"/>	NA/UA	<input type="text" value="3"/> i
b) Volumes added during year ( 1.b.i - 1.b.ii )	<input type="text"/>	NA/UA	<input type="text"/>
i) Volumes added during year -- Gross	<input type="text"/>	NA/UA	<input type="text"/>
ii) Volumes withdrawn during the year	<input type="text"/>	NA/UA	<input type="text"/>
2) Number of monographic volumes purchased	<input type="text"/>	NA/UA	<input type="text"/>
3) Basis of volume count is:	<input type="text" value="Bibliographic"/>	NA/UA	<input type="text"/>

**(1) Calculated fields** - These are identified by the grayed out appearance as well as your inability to enter data. These fields are calculated based on entries in other boxes according to the formula indicated in parentheses. If you have selected NA/UA for any part of a mathematical formula rather than entering data, you must enter the total for that function manually.

**(2) NA/UA boxes** - If your institution cannot provide data for any particular item, check the NA/UA box next to that item. NA/UA should be used when data are not available for a specific item, or (for non-university libraries) when a given question does not apply to the institution. Checking NA/UA on a given item overrides any response that has been entered; numeric data given for that item will be erased.

**(3) i** - Definitions are provided for survey items. Those definitions are identified by an information icon **i** next to the data entry area. Simply click on the icon to open a new window containing the additional information.

(4) **Footnotes icon**  - Footnotes provide you with the opportunity to explain discrepancies in your data, document local practices that differ from the survey definitions, and add additional information about figures. Respondents are encouraged to be clear and concise. Click on the footnotes icon  next to each item to enter additional details and information about your survey data. After you have entered a footnote, the icon will change in appearance to .

Other form features include:

- **'Save' button** - To save your entries, be sure to click the 'Save' buttons located throughout the form. Clicking a 'Save' button will save all entries in the form regardless of location. If you attempt to leave the page without saving your entries, a dialogue box will appear to remind you of this. Note any data you entered and did not save will NOT be available next time you login. A notice will appear on the top of the form in red to inform you that you saved data successfully.
- **'Ready for Review' button** -located at the bottom of each form, this button should **only** be clicked when **data entry** for a branch is **complete**. Clicking this button alerts your institution's primary contact that the data is ready for review. However, you are able to return to this form to edit data until its final submission to ARL by your institution's primary contact.
- **Entry area for general footnotes** - entry boxes for general footnotes can be found at the bottom of each survey form.

As you enter data, here are a few other key points to remember:

- **If you exit the Web form for any reason, remember to save your data!**
- Footnotes must be entered in the footnote box attached to each item. Do not attempt to place notes in the response fields.
- Explain any major increases or decreases from last year's data in footnotes. For the percent increases and decreases used to check for data accuracy in the ARL Statistics, see: <http://www.arl.org/bm~doc/arlstatpercent.xls>
- Document local practice that differs from the definitions found in the instructions, and explain in footnotes.

## Resources

All documents needed in completing the annual surveys are available on the ARL website at <http://www.arl.org/stats/annualsurveys/arlstats/07statmail.shtml>. These documents include data collection instructions and helpful worksheets

For assistance, please e-mail Martha Kyrillidou ([martha@arl.org](mailto:martha@arl.org)) or Mark Young ([stats-ra@arl.org](mailto:stats-ra@arl.org)). Tel. (202) 296-2296.