

INSTRUCTIONS FOR SUBMITTING ARL STATISTICS DATA ONLINE

Overview

The ARL Statistics Web interface is used for data entry, automatically performs many required math functions, and generally provides for simpler, faster, and more accurate submission of data to ARL. Below is a general overview of the data submission process:

Step 1: Survey Set-up:

- A. Designating reporting branches for your survey,
- B. Designate data entry rights for users
- C. Designate branch publication inclusion

Step 2: Monitor Data Entry

Step 3: Review and Submit Data

For the ARL Statistics 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 responsible for defining who the system users are for a particular survey and the library branches that will report data. The primary contact is exclusively responsible for the completion of steps 1, 3, and 4 of the submittal process outlined above. These individuals should read this document in its entirety.
- **Users** – these are all other members of an institution’s staff who are involved in the data submittal process or any staff member who may be added to the system to have view access only. Generally, these individuals may be involved in step 2 of the submittal process. Users involved in data submittal should read the General Instructions in the next section and then can skip to the section on data entry (pg 5).

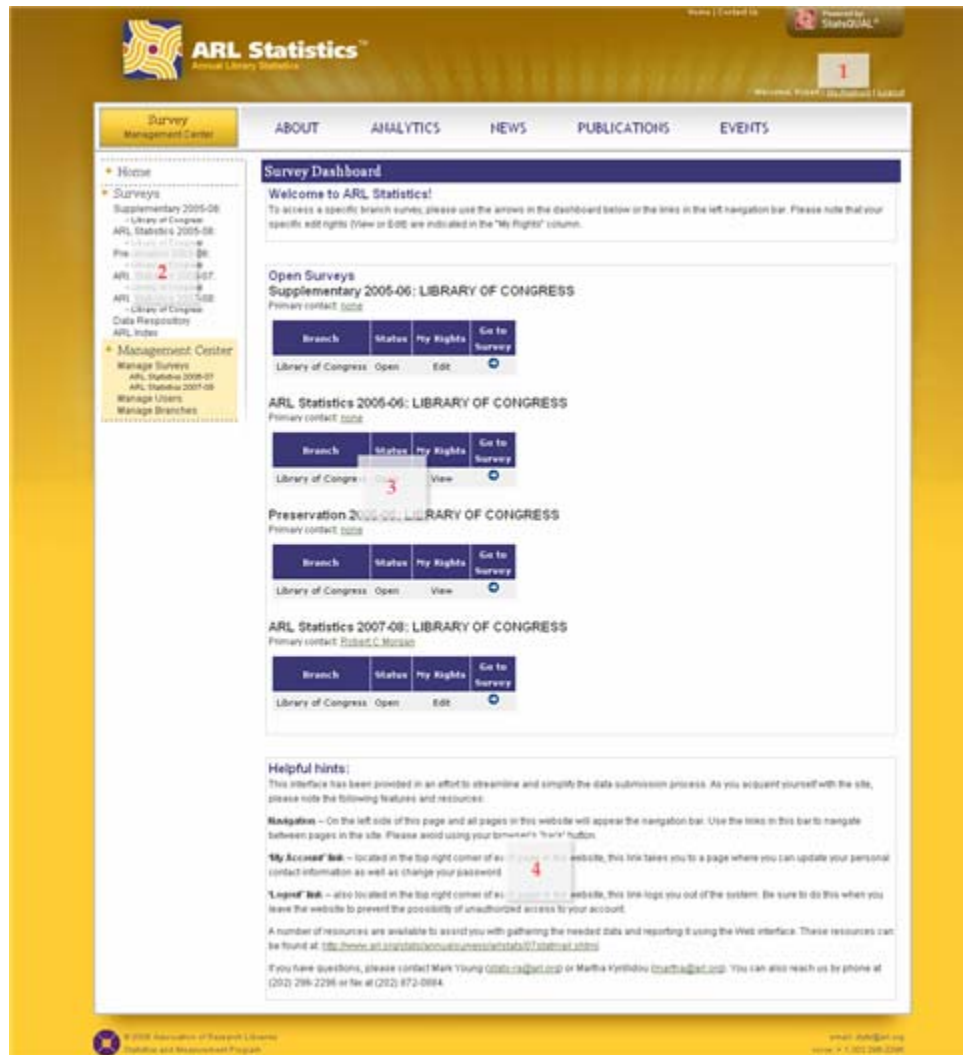
General Instructions

Login

- Point your browser to www.arlstatistics.org and login.
- Enter your e-mail address and password. Note: click on the checkbox to store your user name and password in the browser. Only check this box if you login from your own private computer.
- **If you have forgotten your password**, please click on the ‘Forgot your password?’ link. You will be 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 a message at this address 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) – 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.

- **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. This section also has links to summaries and survey forms from previous surveys (“Data Repository”) and ARL Index files.
- **Management Center** – 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

Survey Prep: Defining system users and library branches for your institution

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

Manage Branches - Review the library branches listed for use in submitting your data. Follow the directions on the page to make any additions or changes. 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 during survey set-up.

Manage Users - Review the users who have access to the ARL Statistics data entry system for your institution. Follow the directions on the page to make any additions or changes.

The remainder of the survey process can be completed and monitored from the corresponding links listed under ‘Manage Surveys’ in the Management Center. Click on each survey link to complete the following steps:

Step 1: Survey Set-up

Follow the directions given on each screen. During the survey set-up, you will designate the library branches reporting data, identify members of your staff who will enter data

for each reporting branch, and designate in which publications each branch's data should be reported.

Step 2: Monitor Data Entry

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 its data form (via the → icons). Use this page to monitor and/or complete the data entry process for this survey. Once all reporting 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: Review and Submit your Data

In step three, you are presented with a page which aggregates the data entered in step two into its designated publication. For **EACH** tab, please do the following:

1) Review your response for each question and compare with the previous year's total. In cases where there has been a significant percentage of change, be sure you have provided a footnote to justify the variation. If you find data that needs adjusting, visit the individual branch survey forms via the left navigation.

2) For multiple choice questions, select the radio button of the choice you would like to display in the publication. If only one branch has been aggregated in the tab, this selection will be automatically made for you based on what you entered in the data form.

3) At the end of each response row is a checkbox in a column marked NA/UA. Check this box **only** if you wish for the data displayed for this question to appear as 'NA/UA' in the publication. Otherwise, leave the checkbox blank.

When you have completed your review of each tab, be sure to click the 'Save' button at the bottom of the page to save your selections [This must be done for each tab separately].

When you have finished reviewing your data and are ready to submit your data to ARL, click the 'Submit' button at the bottom of the page. Note that once you click this button, all data for this survey will be locked and can no longer be modified through the web interface. **Carefully review your data prior to submission!**

Once you see '**Step 4) Survey Complete**' displayed at the top of the page, you have successfully submitted your data to ARL and the survey is now closed. No further edits can be made via this website but you will still be able to view the branch forms and summaries if needed (via the left navigation). If you need to make corrections to your data after submittal, please contact the Statistics and Measurement staff at 202-296-2296 or stats@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 and from the Survey Dashboard. You may edit forms if designated with those rights by your institution's primary contact (your rights to a form will appear in red at the top). On each branch form, note the following features:

ARL Statistics: 2007-08 - Branch: Library of Congress

You cannot edit this form. The data has been submitted to ARL for verification.

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:




- Click for information on a particular question or survey.
- Add a new footnote to a question.
- Edit an existing footnote.

Question	Response	NA/UA
Volumes		
1) Volumes held June 30, 2008 (I.a + I.b)	23000	<input type="checkbox"/> 2
a) Volumes held as of June 30, 2007	20000	<input type="checkbox"/> 4
b) Volumes added during year (I.b.i - I.b.ii)	3000	<input type="checkbox"/> 3
i) Volumes added during year -- Gross	5000	<input type="checkbox"/>
ii) Volumes withdrawn during the year	2000	<input type="checkbox"/>

(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)  - Definitions are provided for survey items. Those definitions are identified by an information icon  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 by including a footnote.

Resources

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

For assistance, please e-mail Martha Kyrillidou (martha@arl.org) or Les Bland (stats@arl.org). Tel. (202) 296-2296.