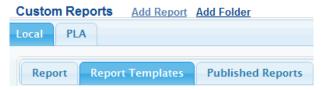


On the Reports page you will find at least two top-level tabs; Local, and PLDS. Under the Local tab you will find at least three tabs; Reports, Report Templates, and Published Reports.



Report contains locally created reports, ones that you and/or your library have created/modified.

**Report Templates** contains report templates that are shared with all users in your organization, for creating their own custom Report based on the settings defined in the Template.

**Published Reports** contain URL(s) to Report(s) previously published. Each Published Report has a unique URL assigned. This URL is a "perma-link" to the report outputs that can be shared with others via email or posting on a website. Access to a published report does not require a secure login, enabling you to easily share your results with a wider audience.

The green navigation bar includes links to Library Trend and Ranking Reports.



#### **Library Trend:**

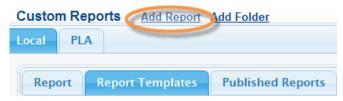
• Trend reports highlight the trend of results for the selected Collection, Period(s) and Data Elements. The Library Trend report shows a summary trend of the data for the selected periods and the percentage difference (gap) of results.

## Ranking Report:

• Ranking Reports summarize the results for your organization and/or location versus other organizations/locations. The Ranking Report includes Minimum, Average, and Maximum values for all reporting institutions/locations for ease of comparing your results.

# Managing Reports:

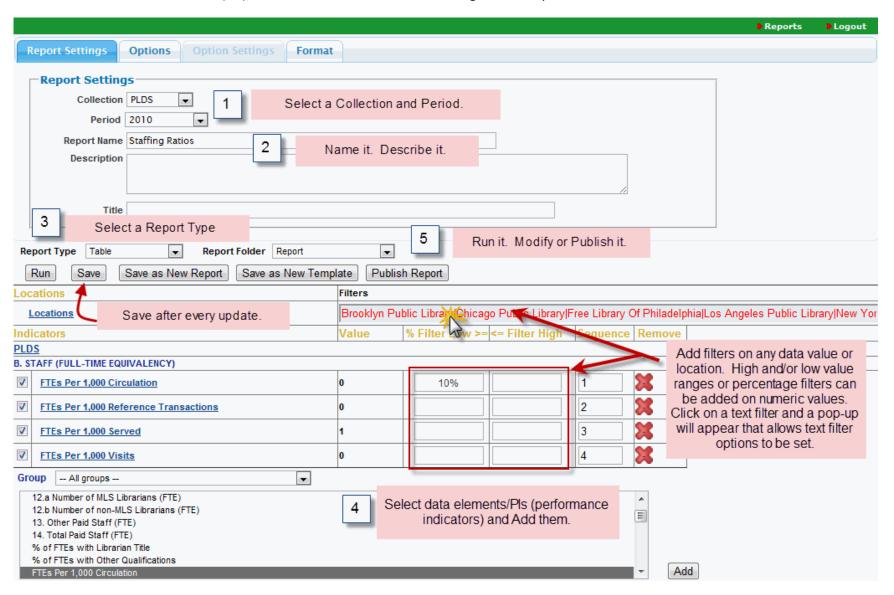
The **Report Management Screen** is an on-line filing cabinet with folder tabs for organizing reports. By default, you have access to the folders as shown above. New reports can be created using the "**Add Report**" link or by selecting an existing **Report Name (or Report Template)** and then Saving the report settings as a New Report.



PI – Performance Indicator

#### **Create a New Report**

To create and set-up a new report, click on the "Add Report" link (highlighted above.) This opens the "Report Settings" screen (shown below) where you can define the Performance Indicators (PIs), Collections, Periods and other settings for the report.



[1] Begin by selecting a Collection from the list of available Collections, e.g. PLDS, as shown above. Once a Collection is selected the screen will refresh with the list of available PIs [4] for the selected Collection. To expedite the selection of specific PIs to include in the Report, you can specify a Group/Section name PI – Performance Indicator

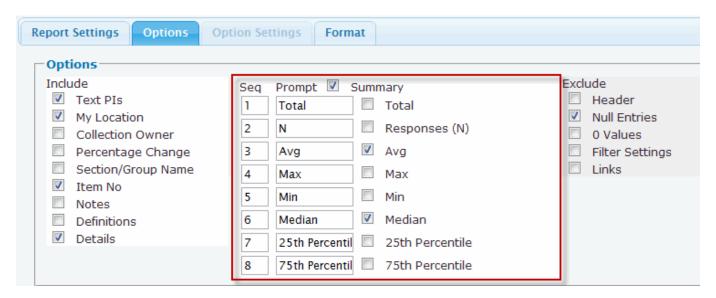
from the available list. Select one or more PIs (click the PI name to highlight,) then click "Add". You can also multi-select PIs by holding down the control key (or command key for Apple users) when selecting PIs. You can also add PIs from more than one Collection. To do so, simply select a different Collection from the available list and then Add the PIs as appropriate. The Options tab features various settings including the Min, Max, Mean, Median, Total, and Quartile settings.

**Tips** Click on the Report name to open the associated Report Settings Screen. Select "Run" to generate the results. Reports may contain additional links to embedded content that enables drill-downs to additional views or levels of detail such as pop-up charts/graphs and results download. Content in chart/graphic format are represented by a graph icon. Clicking on a graph icon will present the chart/graph in a subsequent pop-up window.

Additionally, export/download icons indicate the file format for the information that can be saved. Clicking on these links will produce a downloadable file for viewing in the corresponding target program (e.g., Excel, Word, etc.).

### **Report Options**

The Options tab reveals the various settings that are available (see below)



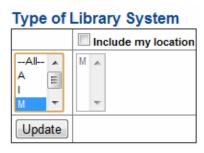
The various report Options enable settings for what should be included/excluded from the results. Use the Option settings to include/exclude details, summary data (e.g., Mean, Median, Max, Min, Total, N), Notes, Definitions, Null Entries, 0 Values, and more.

## **Results Filtering**

Loc	ations	Filters									
L	ocations										
Indi	cators	Value	% Filter Low >=	<= Filter High	Group	Sequence	Remove				
PLD	PLDS										
LIBRARY INFORMATION											
	State/Province	BC CA IL NY C	ON		Group	4	×				
A. G	ENERAL INFORMATION										
	2.i Population of Legal Service Area	174,020,600	1000000		Group	3	×				
Ann	ual Counts										
<b>V</b>	33.c Annual Reference Transactions	186,754,860	5%		Group	1	×				
<b>V</b>	34.c Total Annual Number of Library Visits	795,454,936	50000	500000	Group	1	×				

Any PI added to a Report can be used for filtering results. Percentages (%), Minimum and/or Maximum values can be defined. Filter settings ensure that only locations matching the defined filter criteria are included in the results. The "% Filter Low >=" field can also be used to set a percentage range filter. By setting the Filter Low value to 5% for example, the system will filter values based on comparing the value for the current user's location, such that only locations within +/-5% of the data values for this location are included in the report output. You can also filter text elements (.g., Library name, County, etc.). Click your cursor while hovering over the associated text input fields to get to a pop-up window that enables you to select the choices matching your filter criteria.

Remember to click Update when you are done.



## **Report Types**

LibPAS features many different Report Types, providing you with different views of the results. Most tabular report types feature graph icons to pop-up graphs for the selected results and downloadable Excel files enabling you to explore the results off-line.

PI – Performance Indicator

**Table Report** – A Table report provides a summary view of the data by reporting location for a given period. The resulting report features interactive column sorting, pagination options, and feature graph icons and an Excel download. Results for your location are highlighted (displayed using a different color) in the tabular and graph outputs, for ease of comparison. Options include the inclusion of; summary data (e.g., Avg, Median, Max, Min, Total, N), notes, group names, definitions, etc. or the exclusion of; Null Entries, O Values, Header, etc.

### **Table Report Tips:**

**Display more libraries:** Increase the number of displayed rows at the bottom of the report.

Sorting: Click on the arrow at the top of any column to sort libraries, i.e. by population size, etc.

**Printing:** For larger print-outs adjust your "Page Setup" i.e. "Legal" or "Landscape" or download the results into Excel and further adjust the format.

**Bar graphs:** To enlarge a bar graph click on "Expand" icon toward bottom right of graph (Windows). To print or embed bar graphs in other documents, right-click on the graph and Save to a local folder or use the copy image feature (if available with your browser) to copy-and-paste into another document.

#### Circulation ratios

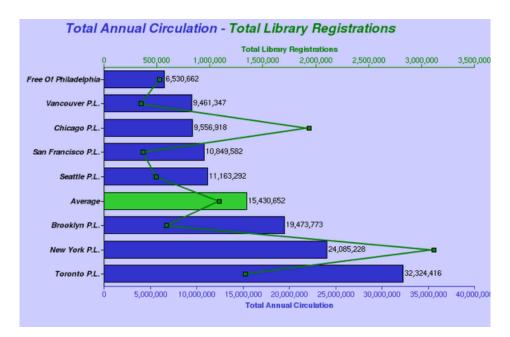
ocations (12)	Total Annual Circulation	Circulation Per Staff FTE	Circulation Per Capit
Toronto Public Library	32,324,416	18,181	12.91
New York Public Library	24,085,228	17,033	7.27
Queens Borough Public Library	21,901,954	15,178	9.49
Brooklyn Public Library	19,473,773	18,943	7.90
Los Angeles Public Library	16,424,469	14,509	4.01
Seattle Public Library	11,163,292	21,808	18.34
San Francisco Public Library	10,849,582	15,797	12.67
Chicago Public Library	9,556,918	8,541	3.55
Vancouver Public Library	9,461,347	18,802	14.72
San Antonio Public Library	6,618,969	16,384	4.01
		<u> (U</u>	<u> 101</u>
Total	172,707,395	186,878	104.67
Avg	14,392,283	15,573	8.72
Max	32,324,416	21,808	18.34
Min	4,316,785	8,541	3.55
Median	11,006,437	16,090	7.58

PI Report – PI Reports summarize the results for the selected PIs (performance indicator) and Period. By default, the output includes the Average (mean), Total, Variances and Quartiles for the selected PI(s) (see the example below). Use the Options tab to change the Summary settings, including the sequence and prompts used, as required.

5.3 Total Circulation									
Average	229,246								
Selected Total	63,959,626								
Variance - 25% above average	286,557								
Variance - 25% below average	171,934								
Lower Quartile - 25%	218,860								
Upper Quartile - 75%	47,452								

**Example PI Report** 

Graph/PI – Displays the values for the PIs in a bar graph sorted by PI value. This report type supports the use of overlays (see example shown).



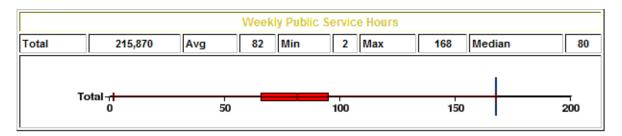
## **Graph/PI Overlays**

The Graph/PI report type provides a setting for an "Overlay" that can be displayed on each generated bar graph. The overlay results appear as a line superimposed on the generated bar graph, with the scale for the overlay along the top axis, and the scale for the bar graph along the bottom. This "cross-tabulation" can help to convey the relationship between values of two PIs. To create an overlay, simply click in the appropriate Overlay field to get to the pop-up screen where you can select the desired PI to overlay. In the example (below) the PI for "Total Circulation" (TOT\_CIRC) has been added as an Overlay to the PIs for "Annual Reference Transactions".

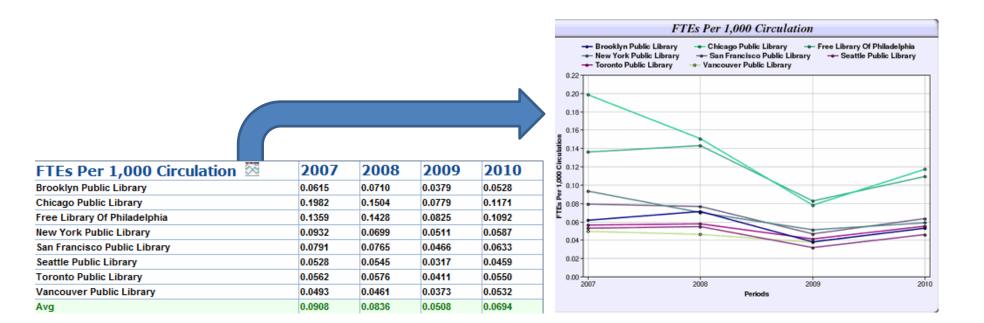
Indicators	Sort	Value	% Filter Low >=	<= Filter High	Overlay	Sequence	Remove
PLDS							
LIBRARY INFORMATION							
State/Province		BC CA IL NY	N			4	×
A. GENERAL INFORMATION							
2.i Population of Legal Service Area		174,020,600	1000000			3	×
Annual Counts							
<b>33.c Annual Reference</b> <u>Transactions</u>		186,754,860	5%		TOT_CIRC	1	×
<b>34.c Total Annual Number of</b> <u>Library Visits</u>		795,454,936	50000	500000		1	×

**Summary** – Summary reports display a summary of all selected locations for the chosen PIs and period. Data is shown for the PI total, min, max, average and median.

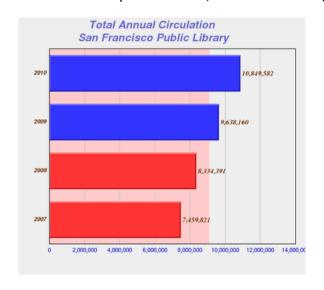
**Summary Graphs** – Summary graph reports present an overall picture of the selected PI(s) for a given period. There is a marker for minimum, maximum, and median values. The red marker in the middle represents where 50% of the results fall. See below.



Trend/PI – The Trend/PI report displays the data for the chosen PIs over the selected periods. This report also features a click only graph of the data.



Trend Reports – Trend reports enable comparison of results over multiple periods. The reports feature pop-up graphs (graph icon), as per the example shown below. You can include as many time periods as are available. Trend reports support various Options including: details and summary data such as the number of respondents (N), the Average (mean), Min and Max values, Median and Total values. In the example Trend graph (below) the pale red shading in the background represents the average. Above average results are shown by the Blue bars, while below average results are shown in red.



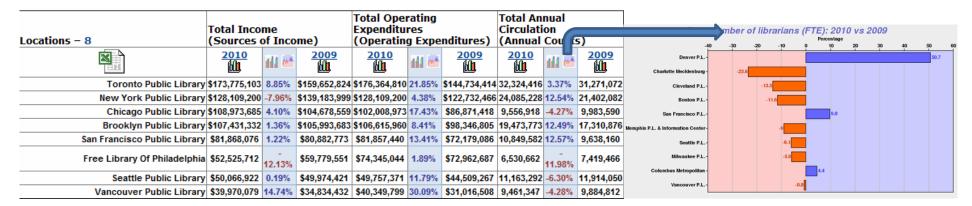
The Trend report can include different report options, select the Options Tab to customize trend reports.

							•		•						
Trend	2007	Diff(%)	2008	Diff(%)	2009	Diff(%)	2010								
Sources of Income															
Total Income															
Brooklyn Public Library															
Chicago Public Library	\$104,674,376	-6.99%	\$97,355,483	7.52%	\$104,678,559	4.1%	\$108,973,685								
Free Library Of Philadelphia															
New York Public Library	\$126,309,136	9.03%	\$137,713,734	1.07%	\$139,183,999	-7.96%	\$128,109,200	Trend	2007	Diff(%)	2008	Diff(%)		2009	2009 Diff(%
San Francisco Public Library	\$64,789,544	21.47%	\$78,699,777	2.77%	\$80,882,773	1.22%	\$81,868,076	Sources of Income Total Income							
Seattle Public Library									\$726,684,516	4.37%	\$758,421,094	-3.09%	1	\$734,980,242	\$734,980,242 1.05%
Toronto Public Library									8	0%	8	0%	İ	8	8 0%
									\$90,835,565	4.37%	\$94,802,637	-3.09%	\$	91,872,530	91,872,530 1.05%
Vancouver Public Library	\$35,044,992	23.48%	\$43,271,846	-19.5%	\$34,834,432	14.74%	\$39,970,079	Max	\$141,458,880	30.13%	\$184,083,168	-13.27%	5	159,652,824	159,652,824 8.85%
Avg	\$90,835,565	4.37%	\$94,802,637	-3.09%	\$91,872,530	1.05%	\$92,840,014	Mir	\$35,044,992	23.48%	\$43,271,846	-19.5%		\$34,834,432	\$34,834,432 14.749
Median	\$87,796,720	0.26%	\$88,027,630	5.4%	\$92,780,666	2.01%	\$94,649,704	Mediar	\$87,796,720	0.26%	\$88,027,630	5.4%	1	\$92,780,666	\$92,780,666 2.01%

Include 'Details' to display the Trend Report with location details, as shown above. Use Filters before running this report to narrow the results.

The Trend Report (featured above) displays the results without any Details. You can choose to add a filter to this report or run the report without a filter to show the results for all respondents. This is a summary Trend Report.

**Period Comparison** – Period comparison reports compare results for two selected periods. This Report Type shows Values for each Period and the Gap (difference). Various Graph icons exist for generating graphs displaying the results of each period and or the differences between each period, including Plus/Minus and Comparative bar charts.



**PI Gap** – The PI Gap Report is useful in comparing two data elements. The paired ordering of PIs in the report output is determined by their Sequence value in the Report settings screen. The PI Gap Report features downloadable Excel results, and click-only icons to pop-up graphs.

Locations – 5	Annual Program Attendance Central/Main Library vs Annual Program Attendance Branches/Bookmobiles					
	<u>60</u>	HI 🖷	<u>(1)</u>			
Vancouver Public Library	78,271	-89.6%	753,647			
Seattle Public Library	49,071	-93.3%	734,214			
Toronto Public Library	37,584	-89.2%	347,975			
Los Angeles Public Library	30,520	-78.3%	140,462			
New York Public Library	24,471	-80.6%	126,114			

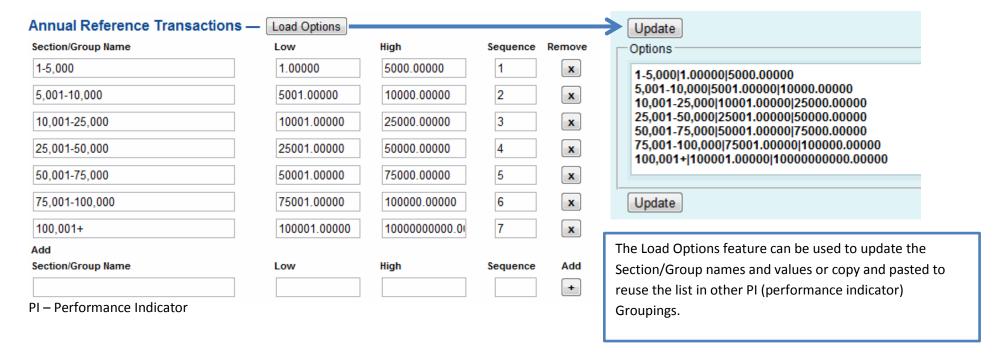
**Example PI Gap Report** 

**Cross Tab** – A Cross Tabulation Report compares a range of results for one PI versus another. You can generate several cross-tab tables in one report. Each selected PI in the report is compared against the first PI (defined by Sequence.) The Cross Tab Report provides counts and percentage values of row and column totals in each cell of the report. Cross Tab Reports also feature links, from the counts, that enable a drill-down to a listing of the corresponding locations and their values for the PIs in the Cross-Tab.

To create a Cross Tab Report you will need to create a report and then setup Group breakouts for the Cross Tab report, see the image below.

Loc	ations	Filters									
Locations		Los Angeles Public Library New York Public Library Seattle Public Library Toronto Public Library Vancouver Pub									
Indicators		Value	% Filter Low >=	<= Filter High	Group		Sequence	Remove			
PLD	PLDS										
Sou	rces of Income										
<b>V</b>	19. Total Income	6,934,304,442			Group		3	28			
Ope	rating Expenditures										
<b>V</b>	24. Total Operating Expenditures	6,759,377,952			Group		4	<b>25</b>			
Ann	ual Counts										
<b>V</b>	36.a Annual Program Attendance Central/Main Library	13,221,031			Group		1	×			
<b>V</b>	36.b Annual Program Attendance Branches/Bookmobiles	26,756,038			Group		2	×			

Once you click on the Group link you can set the groups you would like to use to breakout the data.



_				_						
- 1 /	$^{\circ}$	tal	ш		ır	11	ı	١Ť١	$\cap$	n

Virtual Reference	1-1000	1001- 2000	2001- 3000	3001- 4000	4001- 5000	5001- 6000	6001- 7000	7001- 8000	8001- 9000	9001- 10000	10001- 50000	Row Total
0-250	188 32 91.3	140 23.9 77.3	7 <u>9</u> 13.5 68.1	60 10.2 76.9	41 7 60.3	17 2.9 50	2 <u>0</u> 3.4 50	7 1.2 33.3	1 <u>5</u> 2.6 50	8 1.4 27.6	12 2 9.8	587 63.4
251-500	7 6.5 3.4	24 22.4 13.3	17 15.9 14.7	8 7.5 10.3	13 12.1 19.1	3.7 11.8	10 9.3 25	2.8 14.3	6 5.6 20	2 1.9 6.9	13 12.1 10.6	107 11.6
501-750	6 11.8 2.9	2 3.9 1.1	12 23.5 10.3	3 5.9 3.8	7.8 5.9	4 7.8 11.8	3 5.9 7.5	2 3.9 9.5	1 2 3.3	3 5.9 10.3	11 21.6 8.9	<b>51</b> 5.5
751-1000	1 2.5 0.5	5 12.5 2.8	4 10 3.4	4 10 5.1	2 5 2.9	2 5 5.9	2 5 5	1 2.5 4.8	0 0 0	3 7.5 10.3	16 40 13	40 4.3
1001-2500	3 2.9 1.5	10 9.5 5.5	2 1.9 1.7	1.9 2.6	6 5.7 8.8	<u>6</u> 5.7 17.6	2.9 7.5	8 7.6 38.1	<u>6</u> 5.7 20	11 5	48 45.7 39	105 11.3
2501-5000	1 2.8 0.5	0 0 0	2 5.6 1.7	1 2.8 1.3	2 5.6 2.9	1 2.8 2.9	2 5.6 5	0 0 0	2 5.6 6.7		23 63.9 18.7	36 3.9
Column Total	206 22.2	181 19.5	116 12.5	78 8.4	68 7.3	34 3.7	40 4.3	21 2.3	30 3.2		123 13.3	926 100

Note:First values in each table cell are actual location counts.

Blue numbers in each cell are percentages(%) of row values in that cell.

Green numbers in each cell are percentages(%) of column values in that cell.

Links enable drill-down to specific details for selected entries.

Carnegie Classification (B): % Professional Staff To Total Staff (21-40)

Location	Carnegie Classification ▼	% Professional Staff To Total Staff
Allegheny College	В	28.125
Cornell College	В	38.58093
Franklin & Marshall College	В	29.41176
Kalamazoo College	В	27.77778
Knox College	В	29.66102
McDaniel College	В	23.80952
Messiah College	В	25.45455
Ohio Wesleyan University	В	40
Randolph-Macon College	В	31.25
Washington & Jefferson College	В	31.25
Westminster College	В	25.95628

**Custom Format** – Custom Format Reports provide you with more customizable options including the ability to style the output using Cascading Style Sheets (CSS.) Custom reports also provide a unique URL link that can be inserted into any merge document; thus providing users with a way to integrate results directly into custom formatted Documents (e.g., Word, Excel, etc.). Each time the Document is opened, the most recent data can be fetched from LibPAS. This feature is very handy for auto-creation of standard Monthly, Quarterly and Annual reports that typically include several Custom Reports throughout the Document.

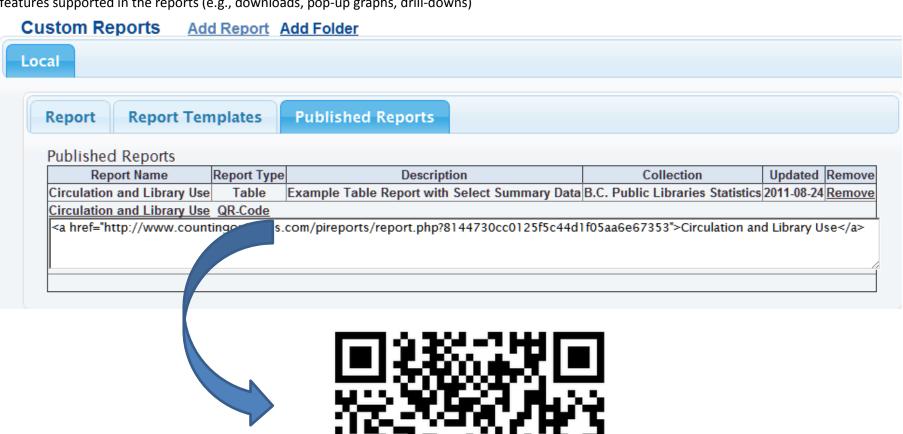
Annual Counts	Potal Cir <sup>Am</sup> uaj Circulation	Reference Transactions	Total Annual Library Visits	Total Amual Number of Programs	Total Amual Program Affendamal
Boston	3,615,923	2,950,142	3,806,437	11,324	212,151
Public Library of Charlotte & Mecklenburg County	7,093,974	5,297,122	5,836,636	14,487	476,498
Cleveland Public Library	6,777,902	1,110,555	3,836,924	10,333	148,662
Columbus Metropolitan Library	14,600,437	1,511,848	7,006,815	23,469	407,945
Central Library	9,292,311	560,000	3,799,914	8,500	343,712
Memphis Public Library and Information Center	1,841,552	1,428,014	2,958,666	2,076	54,619
Milwaukee Public Library	2,702,539	567,561	2,091,580	3,946	86,963
San Francisco Public Library	10,849,582	790,457	6,984,879	9,313	
Seattle Public Library	11,163,292	1,075,608	6,966,428	5,957	175,185
Vancouver Public Library	9,461,347	932,120	6,081,019	7,131	218,733
Total	77,398,859	16,223,427	49,369,298	96,536	2,124,468
N	<u>10</u>	<u>10</u>	<u>10</u>	<u>10</u>	9
Average	7,739,886	1,622,343	4,936,930	9,654	236,052
Max	14,600,437	5,297,122	7,006,815	23,469	476,498
Min	1,841,552	560,000	2,091,580	2,076	54,619
Median	8,193,143	1,093,082	4,836,780	8,907	212,151

Table Report - Custom Format Report

FILE=http://www.countingopinions.com/pireports/report.php?rkey=8b3b8e61f4ea2b4f54cf07cba568d9d5&rid=10395

The URL at the bottom of the report can be embedded into an offline document. This enables the results from this report (and others) to be populated directly into a standard document template (e.g., Word, Excel, etc.)

**Published Reports** – All reports can be published and shared with others by sending via email, text message, twitter or posting on a website or blog. You can also use the QR-Code feature to post links to reports in print materials. Users are not required to login to see the results and can use all the interactive features supported in the reports (e.g., downloads, pop-up graphs, drill-downs)





Try Me!