BIBLIOSTAT COLLECT DOCUMENTATION

I. System Requirements

Minimum requirements: PC Computer running Windows 95
Pentium with 200 Megahertz
32 MB RAM
Dial-up Internet connection with 28.8 modem
Internet Explorer 4.0
Adobe Acrobat Reader 4.0
800 x 600 resolution with 256 colors (8-bit)

Recommended configuration: PC Computer running Windows 95 or higher
Pentium II with 350 Megahertz
64 MB RAM
Direct Internet connection
Internet Explorer 5.5

Before you start: You must use the Internet Explorer browser for Bibliostat Collect. To download it for free, go to http://www.microsoft.com/windows/ie and follow the instructions. You need Adobe Acrobat Reader 4.0 or higher loaded on your computer to print your annual report survey and the instructions. To download it for free, go to http://www.adobe.com/products/acrobat/readstep2.html and follow the instructions. Your screen resolution must be set at 800 x 600 or higher.

Bibliostat Collect is a Web-based product, and is limited by the speed of your Internet connection, the speed of your computer processor, the amount of RAM on your computer, and the number of users on the server. Sections with a great deal of questions and data take longer to load than others. Be patient, it is really only a few seconds. **IMPORTANT: When you see the [Please Wait…] at the top of the page, DO NOT CLICK YOUR MOUSE.** This may result in loss of data. Wait until Bibliostat Collect has finished loading. See section **XI. Troubleshooting** for more on slow response time.

II. Login

Go to http://collect.informata.com. This will take you directly to the login page. You can bookmark this site by right clicking anywhere on the page and choosing "Add to favorites". Click OK in the dialog box that appears. Next time you want to log in, go to Favorites on the Internet Explorer toolbar and choose "Collect Login [v.1.3]" from the Favorites menu.

Enter your assigned username and password. These are not case sensitive. Only one user at a time should log in with the username and password. More than one user CAN be logged in at the same time, but they risk over-writing one another. We recommend that only one person be logged in at any one time to avoid the risk of over-writing.

III. Main Page

In order to protect the integrity of your data, Bibliostat Collect takes control of the entire screen to protect the data you have entered by forcing you to log out of the survey before going to other Internet sites. You will not see the back and forward buttons typical of browsers. Instead, you have four options on the Bibliostat Collect navigation bar: Home, Survey, Status and Printing, and Logout.

    Home lets you select a survey to use on Bibliostat Collect.
    Survey takes you into the annual report survey so you can enter your responses.

Status and Printing lets you view unfinished work, including questions you flag during input (see Green Flag in section **IV. Survey Section Elements**) and edit checks (see section **VII. Edit Checks**), and print your annual survey and annotations. It also contains the *Submit Survey* button for sending your completed annual report survey to the state library.

Logout automatically saves your data and takes you out of Bibliostat Collect.

You will see two frames on the first page. To the left is the Survey Navigator, which allows you to move around parts of the survey as you work on them. The survey is broken down into sections. Each of these is a clickable link that will take you to that section. When you click on a section, the selected section is displayed in the right hand frame.

Documentation: This section is what you are currently reading. It includes basic information on logging in, computer settings and in using specific aspects of the program. It may be helpful to read through the Documentation if you encounter a problem during your use of the system.

Instructions: Provided by the state library, this section contains specific instructions on how to complete the annual report survey for your state.

Survey Sections: The survey is broken up into sections and each has a link in the *Survey Navigator* that includes the name of the section and the range of questions by number, i.e. <u>**General Information**</u>. You may work on the sections in any order you wish. To go to a specific section, click on the section in the *Survey Navigator*.

Parts: In order to improve performance time, survey sections are split into parts when there are too many questions for one page. Simple click on *Part I* or *Part II* instead of the section name.

IV. Survey Section Elements

Select the desired section from the *Survey Navigator* by clicking on the link to it. The right hand frame will move to that section and display all the questions in it. The name of the section is at the top of the frame and there are *Next*, *Back*, and *Update* buttons at the lower right corner. See section **V. Filling out the Survey** for an explanation of the buttons' functions.

The components of each question are: the question number, the data element to be reported,

previous year's data, a data entry box, a green flag, and a notepad icon.

Question number: The number is a link to *Help* for that particular question. The *Help* is provided by the state library and usually explains or defines the data element being reported. Click on the question number to open the *Help*. Click *OK* to close it.

Data Element: This is a brief description of the data to be reported to the state library.

Previous Year's Data: If available, the survey data you submitted last year is displayed to the immediate left of the entry box. You may cut and paste this data if it has remained the same for this year. Select the previous year's data by highlighting it with the mouse. Use Control+C to copy the data. Click in the data entry box and use Control+V to paste the data into the box.

Data Entry Box: You will generally enter the reporting year's data into this box by clicking in the box and typing in the number or information. You may also cut and paste the previous year's data if it remained the same (see above). Information that doesn't normally change

from year to year may be pre-filled in the current year data entry box. You need to modify such entries only if the information has actually changed from the previous year. However, you will notice that most statistical fields are not pre-filled, since most of those DO change from year to year. The state library may have locked certain data entry boxes so that only they can change the data (see State Library Use Only in section **V. Filling out the survey**).

Green Flag: Click on the flag and it gets darker. This is a way for you to mark a question to which you want to return. You can view all the flagged responses by selecting *Status and Printing* on the navigation bar at the top of the page; then under *Views*, select *View all flagged questions*.

Notepad: You may use this to annotate your answer to any question that requires it. This happens if the data from your survey generates an "Edit Check," or if you simply wish to provide additional information locally, to the state, or to the federal government. Click on the notepad icon next to the question. Check the top margin of the notepad. If the Federal tab is highlighted, then the annotation will go to the federal statistics collection program with which the state library cooperates, and to the state library itself. All of the notepads default to the Federal tab. If you want to annotate a response to the state or to your own library, you will need to click on the respective tab on the top of the notepad. Your notes will be included with your responses on the annual report survey.

V. Filling Out the Survey

Navigating the Survey: Fill out the survey by clicking on the section in the *Survey Navigator* you wish to work on and entering the data in the data entry box. To move between data entry boxes, use the tab key, or use the mouse to click in the appropriate box. To move within the section, use the scroll bar on the right or the up and down arrow keys on the keyboard. To move from one section to the next, use *Next* at the bottom of the section. *Back* takes you to the previous section of the survey. You can also click on the name of the section in the *Survey Navigator* on the left of the screen. Make sure that you scroll to the bottom of each screen. Every data entry box must be complete before the survey is submitted to the state library. If the question does not apply, your state library may direct you to enter "N/A" in the box.

Question Definitions: For questions where you are unsure of a definition, click the question number for an explanation, or click the green flag to flag this question for later consideration.

Automatic Calculations: Questions in dark red are totals of other questions. These are totaled from your input in the appropriate fields above the total field. In order to get the new totals you must click *Update*. You cannot change these totals, except by changing the contributing responses used to create the total field and then clicking *Update*. If the automatic calculation involves data entry boxes from repeating groups, you need to click *Update* twice to activate the automatic total.

State Library Use Only: There may be certain survey questions that are for the state library's use only. They may be noted as such. They will generally be pre-filled with the previous year's data for your library, which the state library will update following your submission of your survey. You will not be able to make changes to the data; you cannot even place your cursor in the box. You can, however, leave a note for the state library in the notepad if you notice something about the data to which you believe the state library should be alerted.

Hours Worksheet Calculation: This tool may be included in your survey to help you answer a question regarding Total Public Service Hours. Under the question, click the word

"here" in green and another window opens with the Worksheet Calculation Tool and instructions for using it. Follow the instructions in this window. If you have calculated this value manually, you do not need to use this tool. You can simply input your value into the data entry box.

VI. Repeating Groups

Some sections of the annual report may contain repeating groups to allow you to customize the size of your survey. You can add as many groups of the same questions as needed. For example, some libraries have three branches, some have one or two, and some do not have any. With the repeating group, you can complete as many groups (branches in this case) as needed. A repeating group may appear in the annual report when you are completing information about branches, trustees, source of income, contracting municipalities, etc. You will notice that the previous year's data will not be displayed, but many of the data entry boxes may be pre-filled for you. You can add another group of questions by clicking *Add Group* (or *Add Branch* in the previous example). In order to correctly save each group, you must first add a blank group, fill out the data for that group, and click *Update* before adding subsequent groups. When you add groups, it is possible that the section will be split into two parts (see Parts in section **III. Main Page**). If you have blank or unwanted groups of questions, you can click *Remove Group* (or *Remove Branch* in the previous example) to delete the extra response boxes. However, even if the question does not apply to your library (you do not have any branches), at least one group must be completed with "N/A" in each data entry box.

VII. Edit Checks

Edit checks have been developed by the state library and the federal government for certain questions to alert you when the responses may be questionable when compared to state or national norms. They will only appear after you have entered your data, and only if that data is outside of the specified range. To access your edit checks, see *View all edit checks for review* in **VIII**, below.

The edit checks serve the purpose of letting you see the criteria and explain your data before it gets submitted to the state library. You may need to correct a simple typo. If the data you entered is correct, you need to write an annotation on the notepad to explain why that data is correct.

The question will appear with the reason for the edit check below in bright red. If you can annotate the response, the message will tell you whether to use the Federal or the State note. If the data is incorrect, simply correct the data in the entry box. If the edit check is on an automatic total and the figure is wrong, you will need to change the data in the contributing fields.

When the data is within the specified range (after clicking *Update*), the edit check will disappear. If the data in the entry box is correct, write a note using the notepad to annotate your response. For state edit checks, use the State note and for federal edit checks, use the Federal (default) note. When you annotate a correct response using the notepad (and after clicking *Update*), the edit check message will turn green.

VIII. View the Status of Your Data Input

You may check your progress by clicking the *Status and Printing* link at the top of the screen, which will give you several options.

View all unanswered questions: Click here to see if there are any questions you have missed. Any unanswered questions will be listed in order by section. You can then enter the data directly into the data entry boxes.

View all flagged questions: Click here to see any questions that you have flagged for further consideration. When you have completed the question to your satisfaction, click the green flag to unflag the question.

View all edit checks for review: Click here to see any edit checks that were generated by entering your annual report survey data. See section **VII. Edit Checks**.

To move between these sections you must click the *Status and Printing* link at the top of the screen.

IX. Printing Reports

There are two printable reports available in the *Status and Printing* section: the *Survey Report* and the *Annotation Report*.

Survey Report: Click here to generate a printable version of the data you entered in your annual report survey. There are several print options available to you. You can choose to print the entire survey, selected sections of the survey, with or without the current year's data, and with or without the previous year's data. Click on the appropriate radio button for your selection. If you are choosing a particular section, click the down arrow at the right of the selection box and select the section you wish to print.

You can also choose to print the report in either PDF or HTML format. The main difference between the two reports is that the PDF report has a page break between each section, and the HTML does not. That makes the HTML version consume a little less paper if you do not need each section to start on a new page. The HTML version also generates the report in less time. A separate window will open when the report has been generated.

If you wish to print a copy in the PDF format, click *show PDF report*. The formatting may take a few minutes. When the report has been generated, Adobe Acrobat Reader will be started. Click the print icon at the top left of the Reader screen to print a paper copy. To save this electronic version of your report, click the disk icon at the top left of the Reader screen and follow the usual instructions for that command. Your survey will be saved as a .PDF (Portable Document Format) file.

If you want an HTML version, click *show WEB report*. Once it appears, simply go to the File menu and select Print. To save the electronic version in HTML format, go to the File menu and select Save As and follow the usual instructions for that command.

NOTE: If you are generating a PDF report of a single section, in order to print a report of a different section, you must click on *Status and Printing* again and reselect the type of report and the new section. Otherwise it will generate a report of the section previously selected.

Annotation Report: Click here to generate a printable version of the annotations you made in your annual report survey. You can print Local, State, and Federal notes all on the same report. The procedures are the same as above.

X. Saving your Survey Data

You can save your work many times as you enter the data in Bibliostat Collect. You can manually save it by pressing *Update*. Your data is also saved each time you click on a link in Bibliostat Collect (*Back*, *Next*, any survey section, *Status and Printing*, etc.). Your work is also automatically saved each time you *Logout*.

To save a printable version in electronic format, see **IX**, above.

XI. Final Steps to Submit Your Completed Data

The final steps in this process are:
1. Review each of the *Views* links in *Status and Printing*.
2. Print and save an electronic version of your survey and your annotations.
3. Electronically submit your data to the state library using Bibliostat Collect.

While not all of the links are required by the system, we highly recommend that you go through each of the links under *Status and Printing* before pressing *Submit Survey*. Once you have reviewed and finalized each of the three *Views*, your report is complete and ready to send to the state library.

Be sure to save a printable version of your survey and the annotations before pressing *Submit Survey*. If you do not, you will not be able to print or save a copy of the report, as you are totally locked out of the system as soon as the *Submit Survey* process is completed.

The *Submit Survey* button is located on the *Status and Printing* page. When you press *Submit Survey*, Bibliostat Collect does three things:

- Bibliostat Collect looks for any unanswered questions in your annual report and tells you if any questions are blank. You will be able to submit once each blank is completed.
- Bibliostat Collect checks to be sure all edit checks have been corrected or an annotation has been provided. Only after every edit check has been satisfied will Bibliostat Collect allow you to submit your finalized annual report.
- After the first two steps have been completed, Bibliostat Collect locks you out so that the integrity of the data you have submitted is protected. If, for any reason, you need to access your report again after being locked out, contact the survey administrator at your state library to get your survey "unlocked."

XII. Troubleshooting

Bibliostat Collect doesn't look right
Make sure you are using Microsoft Internet Explorer version 4.0 or higher and that your screen resolution is 800 x 600 or higher.

Lost username or password
You can contact Product Support at 1-866-785-9935 or the survey administrator at your state library.

Logged out automatically
In order to protect the integrity of your data, Bibliostat Collect will log you off after thirty minutes of inactivity. Before logging you off, Bibliostat Collect will automatically save your data and display a warning message. "Inactivity" means that the server doesn't see any activity from you. You can do all the activity you want on your computer, but until you send something to the Bibliostat Collect server, it cannot know that you are "there." That means you could be working on one survey section for 30 minutes, then see the logging out screen and warning, because you have not sent anything (i.e. data or a command) to the server. That is because the server does not know you are still working unless it receives information from you, which involves clicking on some link to the server.

Bibliostat Collect is frozen
Make sure it is frozen by looking up at the top of the screen. If [Please wait…] appears next to Logout, the page is still loading and the system is probably not frozen. This is the same as an hourglass. DO NOT click on anything while you see this. Be patient and refer to section **I. System Requirements**. If you do not see this, logout and login again, or use the F5 key to refresh. You can also use Alt+F4 to close the browser window and go back to the login

screen. You will lose any unsaved data by pressing F5 or Alt+F4. If you are confronted with continuing long [Please wait…] signals, there is likely a technical difficulty with the server, or on your end, or somewhere over the Internet. If this happens, it is probably best to exit the system for a while and come back to try again later.

Bibliostat Collect takes a long time to load

Bibliostat Collect is a Web-based product, and is limited by the speed of your Internet connection, the speed of your computer processor, the amount of RAM on your computer, and the number of users on the server. Note: sections with a great deal of data take longer to load than others. Be patient, it is really only a few seconds, though it sometimes seems forever. If it does take forever, you are probably running into the kind of problem described at the end of the previous section and should follow the advice there.

Additional Help

For any additional information or technical questions about Bibliostat Collect, contact Product Support at 1-866-785-9935.

For questions about the annual report survey or about definitions, please contact the survey administrator at your state library.

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