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SERVICES

State Library Administrative Agency Survey, FY 2012

Web-Based Data Collection Tool User's Guide

Institute of Museum and Library Services

The Institute of Museum and Library Services is authorized under 20 U.S.C. Chapter 72 to fulfill the congressional mandate to carry out analyses of the impact of library services.

Introduction

This user's guide provides information needed to complete the FY 2012 State Library Administrative Agency (SLAA) Survey. There are six steps you must complete to submit your data: log-in, data entry, edit review and resolution, data submission, State Librarian certification, and post-edit survey follow-up. Each of these steps, as well as other information relevant to completing the survey, is discussed below.

If you encounter any problems with the system, please contact the American Institutes for Research (AIR) survey administrators at SLAA@air.org or 1-866-261-2295. The Help Desk is open 8am – 5pm EST Monday through Friday. Respondents who would like assistance outside of these hours may schedule an appointment with an AIR representative.

Log-in

AIR will provide a user ID and temporary password to key holders in a separate document.

You must change your password the first time you log in to the system. On subsequent log-ins, you will be taken to the **Dashboard**, which displays the survey status. If you forget your password, click on the **Forgot Password** link to gain access to the survey. After a successful log-in, you can click on **Start** in the **Action** column to begin a part of the survey.

Navigation

Each page of the survey includes a banner at the top with four menus (**Dashboard**, **Reports**, **Help**, and **Logout**).

There are **three** ways to navigate through the survey.

- **Dashboard.** This is the home screen of the survey and is where the user should go to begin each part of the survey. By clicking the **Start/Continue** link for each part in the **Action** column, the user will be taken to that part of the survey. The **Dashboard** also shows the status of each part of the survey. There are three possible statuses:
 - **Not Started** means that the user has not entered data for that part.
 - **Errors Exist** means that the user has entered data, but errors exist.
 - **Clean** means that data have been entered and no questionable data exist.
- The status of each part is continually updated, so you will be able to identify which parts need additional information.
- **Go To** button. This button appears at the bottom of each survey section. Select a section in the drop-down menu and then click the **Go To** button to jump to that part of the

survey. Clicking on the Go To button also will save the survey data entered on the current page.

- **Save & Next** and **Save & Previous** buttons. These buttons appear at the bottom of each survey section. Clicking on these buttons will save the data on the current page and will move you to either the next page or the previous page.

Printing

Use your browser's **Print** button or the **Print** option under the **File** menu to print the survey data directly from the data entry screens.

A blank version of the survey data entry form may be viewed and printed using the **Survey Form (Blank)** option found on the **Reports** menu. You also can view and print forms that include any current-year data that has been entered via the **Survey Form (Current Year Data)** found on the **Reports** menu. Similarly, you can view and print forms that include prior-year data via the **Survey Form (Prior Year Data)** option. After clicking on each of these options, a **File Download** dialogue box will open, and you will be able to open or save the .pdf document. Once opened, the document can be printed. Use your browser's **Back** button to return to the previously viewed screen.

Data Entry

Although the survey does not have to be completed in a specific order, you may wish to move sequentially through Parts A through M, as edits in later parts are affected by entries in earlier parts. Please note the following instructions:

- **Identification verification. Part A. (State Library Administrative Agency Identification)** is prefilled with data provided by your agency. *Please verify this information and correct or update anything that has changed.*
- **Saving/viewing data.** You must save your data before exiting each part of the survey. The **Verify & Save** button will save the data and stay on the current screen. The **Save & Next** button will save the data and move to the next screen. The **Save & Previous** button will save the data and move to the previous screen. *It is recommended that you save data frequently.* When a screen is saved, edit icons will appear next to data cells that have missing or questionable data. Click on an icon to review the edit message and the required action.
- **Navigating the survey.** Use the **Tab** and **Shift+Tab** keys to move back and forth between the data entry boxes. The **Delete** and **Backspace** keys are active inside each data entry box.

NOTE: Your session will expire after 15 minutes of inactivity. Saved data will not be lost. However, unsaved data will be lost. Please be sure to save your responses frequently.

Edit Review and Resolution

Edit messages are generated for individual survey pages as data are saved (e.g., after clicking the **Verify & Save** button). There are three types of edit messages, each identified by a unique icon:

- **Fatal Error** (denoted with a red icon ). Either data are missing and must be provided or the data entered must be corrected. Fatal errors must be resolved before you can submit the survey.
- **Confirm or Explain** (denoted with a yellow icon ). Indicates that the data are questionable. You should review the data for accuracy and enter correct data, if appropriate. If the questionable data are correct, you can resolve the edit message by entering an explanation in the **Justification** field in the Edit Report and clicking **Save Justification**. Providing a clear, concise explanation may eliminate the need for future follow-ups about the data. Please note that text entered in the Justification field will not be saved unless you click on one of the **Save Justification** buttons located at the top and bottom of the Edit Report.
- **Edit Reason (Accepted)** (denoted with a gray icon ). An explanation for questionable data has been provided.

The edit icons serve as links to the edit messages. Clicking on an icon will take you to the **Edit Report** that notes the edit message and the action required to resolve the message. You also may access the **Edit Report** option by clicking the button at the bottom of each page. Each edit message contains seven items:

- Edit Code (edit message number)
- Line Number (survey item)
- Section (survey part and page)
- Message
- Value (current-year or prior-year data that are related to the edit)
- Justification (text box to enter explanations, if applicable)
- Accepted (edit message resolution status — Yes or No)

Once all edit messages are resolved, “Yes” will appear for each section in the **Accepted** column of the **Dashboard** and the **Submit Data** button will be enabled.

NOTE: All edit messages must be resolved by revising or confirming the data in order to lock and submit the survey. Changes to data may generate new edit messages that you will need to resolve.

Data Submission

When the survey is complete and all edit messages have been resolved, the **Edit Report** will display **Yes** in the **Accepted** column for each edit failure. To submit the data, click the **Submit Data** button on the **Dashboard** screen. After clicking **Submit Data**, you will be asked to provide an estimate of the number of hours it took to complete the survey. After clicking the Submit Data button, you will have two options:

- **Continue with Locking.** By clicking this button, you will finish the process of locking the data, and the system will send an e-mail to the State Librarian confirming that the data has been submitted and is ready for certification.
- **Return to Dashboard.** This button will navigate back to the survey without submitting the data.

After your survey is locked, you will still be able to view and print your data; however, you will not be able to make any changes to the data unless a request is submitted to the SLAA Help Desk. *This action should not be a substitute for entering the correct data initially.* If you discover a data error after locking your survey, contact the SLAA Help Desk at SLAA@air.org or **1-866-261-2295**. The Help Desk will assist in correcting any errors and resubmitting the data. The survey administrators will notify the State Librarian that previously locked data have been “unlocked” and certification will be required after the data is resubmitted.

State Librarian Certification

After the key holder locks the survey data, an e-mail will be sent to the State Librarian describing the certification process. The e-mail will include a web link for the certification, as well as a user ID and password for authorization. The key holder will be notified by e-mail once the State Librarian certifies the data.

Post-Edit Survey Follow-up

After data submission, AIR will review the data. After the review, a document containing any follow-up questions will be posted on the survey website. You will receive e-mail notification that this document is available for review. After logging in to the survey, the Dashboard will have a **Files Available for Download** section at the bottom with a link to the follow-up edit report. After clicking on the link, you can choose to save or open the file.

After providing explanations for each question, you will save the file and then upload it to the website. To upload the document, click the link under the **File Uploads** section of the dashboard. Click the **Browse** button to find the file that needs to be uploaded. After selecting the file, click **Open** and then **Upload File**. When providing explanations in the follow-up edit report, only write a response in the yellow column, labeled **Response**. Changes to any other cells in the spreadsheet will not be reviewed. If there are problems providing an explanation in the table, please contact the AIR survey administrators.

Logout

You may leave a session at any time using the **Logout** button found on the banner of each survey page.