

Transcript - New or Interim SDC Training Video

Welcome to the Public Libraries Survey (PLS) Web Portal Training on how to get started for new or interim SDC.

To get started here is a list of common acronyms used in the PLS Web Portal. We have:

- AE – or Administrative Entity
- PY – or Prior Year (data)
- CY – or Current Year (data)
- FY – Fiscal Year
- PLS – Public Libraries Survey
- SDC – State Data Coordinator
- CO – or Chief Office (aka State Librarian)
- IMLS – Institute of Museum and Library Services
- AIR – American Institutes for Research

When preparing for the data collection please visit the IMLS PLS website. Import specifications documentation outlining how to structure your data files prior to import can be found on the IMLS PLS website. Edit Changes to SDC documentation outlining the edit checks that will be done to your data can also be found there. These documents can be found under the Fiscal Year 2016 PLS data page.

Here is a brief overview of the data collection process. A week before the launch of the survey you will receive an email that includes an Advance Letter and the User's Guide. On the day of the start of the data collection for your group you will receive an email from the PLS research team with a survey link and instructions. The link for you to set your password will be sent in a separate email. Once you have set your password you can use your email as your user name and your password to log in to the survey. Then you will be directed to the home page where you can select section to start inputting data, starting with your State Characteristics. Once you have input your data you will be able to run Match Reports and Edit Reports or Table Reports. Once you have imported all of your data and run your reports you may lock your data.

As previously stated, pre-collection information and materials are emailed prior to the start of the data collection, usually in December. This advance letter includes the User's Guide and any advance notification attachments. Upon notification that there has been a change in an SDC assignment, AIR will resend these materials to the new or interim SDC.

E-mail invitations for new or interim SDCs will be sent as a separate e-mail from the PLS@air.org email address. We will provide a temporary link for setting up PLS Web Portal account. Please note that the links will expire after 24 hours.

When logging into the PLS Web Portal your username and password are required. Your username in your email address and your password must contain at least 8 characters (one lowercase, one uppercase, one digit, and one special character). Valid special characters are: @ ! # \$ % ^ & + =

When logging in if you forget your password or receive a “Token Error,” click the “Forgot Password” button on the login page. The Web Portal will send you an e-mail with a temporary link to reset your password, similar to when you created your password. If you have additional trouble logging in, please contact the PLS help Desk. We can be reached at PLS@air.org or 1-866-744-5746.

When you first log-in to the PLS Web Portal you will see the Web Instructions page. This page provides an overview of the steps required to submit PLS data. Briefly, they are:

- Entering your State Characteristics;
- Importing or entering your AE data;
- Importing or entering your Outlet data;
- Running a match report;
- After successfully passing a Match Report, running your Edit Report;
- And then once your Edit Report has been cleared of all critical edits, you can then lock your data.
- After your data has been locked, an email will be sent to your CO with you CC'd, and the CO will then need to certify your data.

After your initial log-in, these instructions will not appear; however, if you need to reference them again, they are available under the help menu. You can also see the helpful documents section in the homepage.

Once you make it to the homepage, the Survey Information table provides a quick overview of your survey status. The file import section is a shortcut that allows you to import a new file without going through Tools → Import Data. Web instructions, User's Guide, and Match and Edit Report Terminology can be found under Helpful Documents. And latest correspondence from PLS can be found under Latest Correspondence. Predominately, this just contains the survey close out dates. More detailed information about the Keppel Awards deadlines and other information are available under Help → Francis Keppel Award Criteria.

Now, we will provide a brief tour of the Web Portal. The Home Menu button will always bring you back to the survey's home webpage. The Survey Status page shows the same survey status box from the Homepage, but accompanied by a list of file status descriptions that could appear in the survey status box. Under Tools, to input your state characteristics, you'll need to go Tools → Input: State Characteristics. Once you have saved this updated information, you can then proceed to input your data, either manually or by inputting it by using the Input Data: AE then the Input Data: Outlet options; or you can import your data by going to the Import Data page. If you need assistance when importing your data, please see the import data video, also available on IMLS's website.

Once you have imported your data, go to Reports and click Run Match Report. Your Match Report is the first report you must run when working through the PLS Web Portal. To view your Match Report, click Download Match Report. An Excel file will be downloaded onto your computer. Once it has finished downloading, it will report to you all the issues currently found in your data between this year and the prior year data. To review what is actually wrong with your data, scroll through these tabs. Any AE issues will either be reported on the Admin Single or the Admin Multi tab, and any Outlet issues will be either reported on the Outlet Single or the Outlet Multi tab. Additionally, if you have made any name changes, anything regarding that will be found on the Name Changes, similarly with the Address Changes. And, any AEs or Outlets that previously existed and are able to be restored will be found on the Restorable AE or the Restorable Outlet tab.

To correct any errors found:

- Reference the error message;
- Find the library in your current and prior year data;
- Then review the data to see if there are any discrepancies.

You must successfully pass Match Report before you can move on to the Edit Report. If you require additional assistance with Structure Changes, please contact the Help Desk and watch the Status Structure changes video. Once Match Report has been cleared, you will receive a Match Report that looks like this. Just simply stating that you have successfully completed Match. Additionally, if you have opened new libraries, they will be found on the New ID tab. Once you have successfully passed Match, go back to the PLS. Go to Reports, and click Run Edit Reports. Once your Edit Report has been run, click the Download Edit Report button to download a copy of your Edit Report. Once the Edit Report has been rendered, it will display a summary page, detailing the number of Non-Critical and Critical Edit Checks. All Critical Edit Checks must be addressed before you can lock your data. Any Non-Critical Edit Checks can be annotated and will pass through lock. To view where the Edit Checks are, simply look at the grid, and go to the tab listed. As previously stated, you can simply annotate information here to pass edit. However, for the Critical Edits, you must fix this error in your data before you can move on.

Once you have successfully addressed all Critical Edits, your Survey Information table will change to say that your Edit Report has been Annotated and there are only Non-Critical Edits remaining. The next step once the annotations have been added is to lock your data. When you are ready to lock your data,

simply go to Tools and click Lock Data. Enter your estimated number of burden hours and click “Yes, Lock My Data.” The system does not allow zero to be entered as a burden estimate.

The Web Portal includes a number of other tools, which we will briefly cover now. Additionally, under Tools you will notice that there is a User Options. If you select User Options, a pop-up box appears that allows you to adjust the Sort Order for Administrative Entities in Input Data, Sort Order for Outlets in Input Data, Sort Order for Edit Report by Edit Number, and then turn on or off the auto save data. You can adjust these however you see fit. I do however suggest that you do not change the auto save function. When you are done editing your options, simply Apply Changes. In addition to being found under Tools, User Options can also be found in the sub menu on the Input Data pages, and it works the same as it would if you just went through Tools.

At any time in the process, and SDC can export a copy of their prior year and current year data. This can be a useful tool when reviewing your data for submission and producing archival copies of the final data files. If you choose to export data from the Web Portal, you will need to go into the Web Portal and click on Tools and click Export Data. On this page, you can select the file format you wish to export and then you can either select current year State Characteristic file, prior year State Characteristic file, current year AE file, prior year AE file, current year Outlet, prior year Outlet – or you can use this button to export all data files for your current and prior year. In addition to the Match and Edit reports, there is a third report called the Tables Report. The Tables Report feature is located under the Reports menu and creates an Excel Workbook that contains 18 tables. You can save the Tables Report to your hard drive as an exported Excel file. There are two summary tables and 16 individual library tables. The two summary tables are a two year comparison of the state totals for each survey item and a two year comparison of the item response rates for the state. The individual library tables list each library in the state and some tables report the per capita and percent distributions for those individual libraries.

Additional resources can also be found under the Help drop down menu. The web instructions provide:

- The initial log-in instructions in pdf format
- The Data Element Definitions link provides the definitions for the data elements
- Name, Address, and Structure Changes can be found here
- This link will provide assistance in resolving the match report
- The import Specifications can be found here
- A list of PLS contacts can be found under the Help Menu
- The deadlines for the Francis Keppel Award and the Criteria for the award can be found here
- Standard abbreviations used during PLS can be found here
- And Edit Messages and Conditions and the logic behind them can be found here

To quickly access the IMLS, PLS website or the PLS wiki, go to external links and this link will take you to the IMLS, PLS website, and the Wiki is another resource available to SDCs.

Thank you for watching this training video for new and interim SDCs. If you have additional questions, please contact the PLS Help Desk and watch our other videos. Thank you.