

## Transcript - Edit Report and Annotation File Training Video

Welcome to the Public Libraries Survey WebPortal Training Video on Edit Reports and Annotations. We will show you how to run an edit report, fix critical edit checks, and annotate non-critical edit checks using two methods, through importing an edit report with annotations for non-critical edits and importing an annotations file.

Here is a simple overview of the workflow process. You must import your state characteristics and import your AE and Outlet files, run your match report and resolve issues. And then you can run your edit report and begin working on resolving critical edit checks. Once you have resolved all critical edit checks, you can import your annotation file or edit report. You must then rerun your edit report so that the annotations are pulled in, and you must review your edit report to annotate any remaining non-critical edit checks. Once you have annotated the remaining non-critical edit checks, you can import your annotated edit report, and then you will be able to lock your data.

Import and edit specifications can be found on the IMLS website. On the webpage for the import and edit files, you will find the Import Specifications, Edits Changes to SDCs, and Import and Edit File Memo.

When annotating the edit report, you must keep in mind that this is a protected file. You can only edit and enter information found in Column C. You can also change text color, fill color, and font color for the other columns, but you cannot edit the data. However, upon import, any formatting changes will be removed. For each noncritical edit check, at least one annotation needs to be entered. With each new import of data, Match and Edit Reports will need to be rerun. Any annotations already imported, whether through the Annotation File or the Edit Report, will remain. Running a new Edit Reports and Match Reports will not delete existing annotations.

Once you have successfully passed your match report, you may proceed with your edit report. Your survey status will be updated saying that you have matched and that no problems were found, and that your next step is to run the edit report. To run your edit report, go to Reports → Run Edit Report. On the following page, click the “Download Edit Report” button. Save the file as you wish to name it and click “Save”. The file will then download to your computer as a new Excel file. Once you have opened an edit report, it will open to the summary page. The summary tab will show you the number of records affected and what tab they are on. It will give you a column for non-critical edits and critical edits. All critical edits must be fixed before you can lock your data. You will know that all critical edits have been fixed when this column shows zero in every row. As you annotate your non-critical edits, this total number should not change unless you have gone into your dataset and changed some data you entered based on an error you received. As you can see, there are several different tabs at the bottom of this edit report. They are:

- Summary
- State Characteristics
- Name and Address
- Other Identification
- Pop and # of outlets

- Staffing
- Revenue
- Expenditures
- Capital
- Collections
- Services
- Programs
- Other Electronics
- Outlets

Each of these tabs corresponds to a section in the user interface, and a range of columns in your data file. For tabs that have no critical edits and non-critical edits found, they will be blank and look much like this. However, if edit checks were triggered, it will look something more along the lines of this: All critical edit checks will be in red text, and all non-critical edit checks will be in black text. Please remember that you must go back into your data and correct critical edits. If you still have red critical edit text on your edit report file, you cannot proceed to lock. As stated, you can annotate non-critical edits by editing text in column C. The more data you manually go in and correct, the less issues we will come back to you with during post-lock processing.

As this example file contains lot of critical edits, I will go through and pick a few that do appear frequently for SDCs. So on the Other Identification tab, two critical edit checks that appear frequently for SDCs are edit check 20629, library's reporting period start date is before the state's reporting period start date, and 20729, the library's reporting period end date is after the state's reporting period end date. To correct this issue, I will need to go to my AE file, and I will need to find these four libraries that are affected. I will need to modify their date to coincide with the state's start and end dates. First I will find the Toledo Public Library. Here is Toledo Public Library, and you can confirm that it is the same library by looking at its FSCSKEY listed in the data file and its FSCS ID listed in the edit report. So I must change the start date so that it matches the start date on the state characteristics page in order to get rid of this critical edit. So I must change the start date to July 1, 2015. Then I will go to the start date and change this to July 1, 2015.

So once I have gone through and made all of my critical edit check corrections, I will then reimport this file, but until that point, I will keep making changes as I go. So to address these end reporting date issues, I will go and find the first, Dike library, and modify its end date to fall before the state's end date. And I will also do this for Janesville, and a test library that I added.

Another common issue can be found on the Pop and # of outlets tab. So on this tab, you will see critical edit 20928, central service outlet is not equal to the number of central outlet records. So this is comparing information on your AE file to information on your Outlet file. So to address this, you need to find where the discrepancies are and which file it applies to. CENTLIB is a variable found on your AE file, and C\_OUT\_TY is a variable found on your Outlet file. On the user interface, CENTLIB can be found on the Population, Outlets, and Staffing page; and C\_OUT\_TY will be on the Associated Outlets page. So to fix this issue, I am going to address the New Hampton Public Library issue where it says CENTLIB count is 70,000. So to do that, I will need to find New Hampton Public Library on the AE file, and I will need to scroll over until I find the CENTLIB header, and it's right here. So I'm going to modify this to be 1. That should take care of that one critical edit check. I will also address the Osceola Public Library as it is

affecting the Outlet file. I'll bring up the Outlet file. So once I've found the Osceola Public Library, I will scroll over to find the C\_OUT\_TY variable, and I will change this abbreviation to say CE. I can confirm that this Osceola Library is the only outlet associated with Osceola Public Library AE by double checking on the PLS Web Portal. To do this, I'll bring up the page and search for Osceola Public Library. It only has one outlet, and as it's currently listed, it's a branch. So I must change this to branch to a CE which I've already done in the data file, so I will not do it here. That will update this so the counts will now equal one.

You have probably also noticed that there are several instances where the number -2 [negative two] is used as a placeholder for data. The PLS WebPortal does not recognize -2 as a legitimate value, and you will need to change any of these to either fill in the correct number or provide a -1 if the data is unknown. For most variables you can provide a -1 [negative one]; however, -1s and zeros for any population data element will trigger a critical edit, and you must provide valid data for those items. So I will go ahead in my data file and fix this issue and a few other -2s that I have found. So I've gone through my AE file and fixed several instances where a -2 was found because it is not a valid response on the PLS data files. So now that I have made all these changes, I'm going to go ahead and save my AE File and my outlet file and then re-import them into the PLS Web portal. Remember that when we re-import data that we must also pass match. Go to Import Data, and I'm going to browse for my file. First remember that we must import the AE file, and then we will import the outlet file. So as my files have been successfully imported, I will run a Match Report, and then preview this Match Report to make sure I have passed. I have successfully passed, so now I can run another Edit Report. Quickly just to show you, this report on the left is the first Edit Report I ran, and the one on the right is the second Edit Report I ran. As you'll notice, the total numbers have decreased between the files. This means I will have less to annotate, and I still have more to go to fix.

I will now show you how to annotate a few additional instances in your edit report. I'm going to go to the Other Identification tab. As you can see, edit checks will have varying numbers of libraries that have been caught. There were four libraries that were caught for edit check 20680. As the same annotation applies to all of these libraries, you only need to add the annotation to the first library under edit check 20680. If you do this, we will assume all libraries should have the same annotation. However, if you have an edit check like 20327 where multiple annotations are needed, please annotate each library referenced, even if some are duplicated. This will cause less confusion during post-lock processing.

Next Steps: If all non-critical edits were annotated, the next step in your survey status table should say "Lock Data." However, if the next step still says "Run Edit Report," there are two possible explanations:

1. Not all non-critical edits were annotated in your last import.
  - a. Please re-run your edit report and review for missing annotations.
2. The system needs to be refreshed. Sometimes it takes the system an additional moment to realize that you have run an additional edit report.
  - a. Please either refresh the page or logout and log back in.

Now we will explain how to use the stand alone annotation file which is an alternative to the edit report. So what is an annotation file? An annotation file is an alternative for annotating the edit report. Many times this file is provided by your vendor. It must be a comma-separated values file, a tab-delimited text

file, or an Excel file. And it must only contain the only following headers, and in this order, and in these columns:

1. Column A should be for Record Type (RECORD TYPE).
2. Column B should be for FSCSKEY and FSCS Sequence number (FSCSKEY-FSCS\_SEQ).
3. Column C should contain the Edit Number (EDITID).
4. Column D should contain the comment (COMMENT).

Please be sure to include the headers in your annotation file.

To import an annotation file, go to Tools → Import Data. On the import page, click “Browse...” select the annotation file saved on your computer, and click “Upload and Import File.” A popup window will appear, asking you to select a file type. Be sure to select “Annotation” in the pop up window and then select “Yes, Import File.”

Next steps after importing your annotation file:

1. You should run a match report and an edit report again.
2. Once you the reports have been run, review the edit report to ensure that all edit checks have been annotated.
3. You will not be able to see your annotations until you have run an edit report.
4. It is unlikely that your vendor will provide annotations for every non-critical edit check listed in the edit report. You will need to review the edit report to confirm that all non-critical edit checks have been annotated.
5. Once you have successfully passed the edit report, you can lock your data.

Thank you for your time. If you have any additional questions, please contact the PLS Helpdesk or view our other training videos. Thank you.