**LibPAS Reports**

**Overview**

The LibPAS Report function can be accessed from your welcome screen after you login. Report Managers have access to all reports listed in the Local > Report folder. The Manage Reports screen is essentially an online report filing cabinet with folder tabs to organize reports and provide access to templates and previously published reports. Folders can be added or removed (4 below) and descriptions and names can be changed. On this screen, new reports can be created also (3 below).



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There are two folders already created for you (1 above). The Local Folder contains any reports that you create. Within the Local Folder, you have subfolders (2 above): Reports –this is the default folder; Report Templates contain reports that have been pre-generated. You can modify these reports by clicking on the report name and then changing the parameters; Published Reports – when you save a report to this folder, a URL and a QR code are automatically generated. These can be copied and pasted into public relations materials or place on your website for public viewing.

The ME folder contains items that have been created by MSL as templates for all libraries to use. You’ll see a brochure, bookmark and a poster in this folder. These items are linked to a particular year’s data set. When you click on one, a Word document will open. It will display the data elements from your annual report for the designated year. You can click “Enable Edit” and then add your own graphics, pictures and text.

Clicking on a report name opens the “Report Settings” and displays the ‘query’ for that report. Click Run to generate the report in a browser window. Some reports contain additional links to embedded content that enables drill downs to additional details. Content in graph/chart format is represented by a graph icon. Clicking on the graph icon will display the chart/graph in another window.

Export/download icons indicate the file format available for information to be stored locally. Clicking on these links will produce a downloadable file for viewing in either Word or Excel.

To create a new report, click the Add button in any local folder or click an existing report, update and save the new settings by selecting the Save as New Report button. Reports will be saved in the current folder unless the folder selection is changed in Report Settings during the report’s creation. Reports can only be added to the Report Template or Published Reports folders by clicking on the Save as New Template or Publish Report buttons respectively in the Report Settings screen.

**Report Types**

There are 11 different types of reports you can generate using LibPAS. Descriptions of each report type are below.

**Table** reports provide a summary view of the data much like the Excel tables you are used to using. You can sort by columns. Graph icons are linked to bar chart views and an Excel download.

**Performance Indicator (PI)** Report presents the data in a rank ordered table and includes summary data such as averages and totals.

**Graph/PI** reports display the data in a bar graph sorted by value in ascending or descending order. This report type supports the use of overlays. Overlays are created in the Report Settings and results in a line superimposed on the bar graph. The overlay creates a visual cross tabulation so you can compare to data elements.

**Summary** reports compile a summary view of each data element included in the report. Again, you choose which data element to display in summary in the Report Settings screen. Summary choices include total, average, mean and others.

**Summary graphs** present the spread of values reported by the libraries chosen in the report. The result is a comparative picture of the data for the period in the report. Markers for Average, Maximum and Minimum are placed on the graph.

**Trend/PI** report displays the data for the selected data elements over the selected time range. This report has a graph only feature.

**Trend** reports allow you to compare data over multiple time periods

**Period Comparison** reports compare the results from two selected periods as well as the difference (gap) between the two periods.

**PI Gap** is useful for comparing data from two data elements.

**Cross Tab** reports compare a range of results for one data element versus another.

**Custom Format** allows you more options for styling your report as well as options for merging data from spreadsheets into your LibPAS report.

**Accessing the Report Screen**



After you’ve logged in to LibPAS using your annual report login and password, click on the Reports link in the upper right of the screen.

**Create a New Report**

When you click on the Add button,



you will see the screen below.



Follow these steps to create a new report:

**Step 1: Select the data set.** LibPAS gives us access to Maine data sets for 10 years as well as access to data collected nationally. You can benchmark your library to any library anywhere in the country if you choose to. Once you’ve chose a data set, the available data elements (PIs) will appear in the area labeled Group (circled below).



**Step 2: Choose the type of report** – table, trend, graph, etc

**Step 3: Select the time frame** - Depending on the type of report you want, you can select one year or multiple years.



**Step 4: Name and describe** your report so that you can identify it if you plan to save it.



**(Title that will be displayed in your folder)**

**(Title that will be displayed on the report)**

**Step 5: Select Locations**

You can run a report on all Maine libraries or choose ones to benchmark against. If you plan to use the same group often, select the libraries and give the group in name in the filter box at the bottom of the screen. Then, you choose filter at the top whenever you want to use that group.

**Step 6: Select and add the data elements** you want to view from the list in the Group section. To expedite the selection of data elements, you can select a group name from the group select list to focus the list on that area. To add the data element, select it by clicking on the data element’s name. The selected element becomes highlighted. Click the Add button to the right to add it to your report. You can also multi-select data elements by holding down the control key (command key for Apple users) when selecting data elements. Click Add to add all the selected data elements to the report.



You can also add data elements from more than one collection. Simply select a different collection from the Select list and add the data elements you want. Any data element added to a report can be used as a filter to restrict your report to a particular range of values.

**Step 7: Report Options** control what is included or excluded from the final report. You can also select to include summary data such as totals or averages.



The table below is a detailed description of each option.

|  |  |
| --- | --- |
| Option  | Description |
| Include: | Check option to include in report output |
| Text PIs | Includes the text description of the data element |
| My location | Forces the inclusion of your library in the output |
| Collection owner | Displays the collection owner’s location and values |
| Percentage change | In a Trend/PI or Trend report, checking this option will calculate the change in value between the reporting periods. |
| Section/group name | Includes the name of the section of the annual report that the data element is located in |
| Item no | Includes the data element’s report number |
| Notes | Adds any notes you’ve included in your annual report as footnotes  |
| Definitions | Adds the data element definition as a footnote |
| Details | Check this setting to include the location names and values in the report. If any of the Summary options below are selected, then unchecking this option will exclude the location names and values from the report but Summary values will still be included. |
| Summary | Check/Uncheck to toggle inclusion/exclusion of summary elements in the report |
| Total | Adds total values |
| Responses (N) | Check this setting to add N- number of responses to the report |
| Avg (Average) | Check this setting to display the average value  |
| Max (Maximum) | Check this setting to display the maximum value  |
| Min (Minimum) | Check this setting to display the minimum value  |
| Median | Check this setting to display the median value  |
| 25th Percentile | Check this setting to display the 25th percentile |
| 75th Percentile | Check this setting to display the 75th percentile |
| Exclude  | Check options to exclude |
| Header | Check to hide the header on report |
| Null entries | Check to exclude locations with only null values |
| 0 values | To exclude locations with only 0 values |
| Derivatives Totals/Avgs (Averages) | Check to exclude summary total and average values for the derivative PIs |
| Filter settings | Any filters are displayed by default. Check this option to exclude your parameters from the final output report |
| Links | Disables all links in reports that feature drill down, download and popup links. Useful when only printing and/or embedding report outputs |

**Step 8: Save –** choose the folder you want to save this report to. The default is Reports.

**Step 9: Run** the reportby clicking the Run button.

**Sample Report Settings**



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You can choose which data elements that you want displayed (1) in the report by using the checkboxes next to each one. Filters allow you to refine your query. To get a report of the number of programs and attendance in libraries with a population of less than 1,000 you would put 1,000 in the ‘filter high’ (2) box. To eliminate libraries with no programs, put 1 in the filter low (3) box for that data element.

You can also change the sequence in which the data elements appear in the final report by changing the numbers in that column. Finally, you can remove a data element by clicking on the red X.



**Final Report**

The report for the query above looks like this:



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Your library is highlighted in red. You can modify the order of any column by clicking on the arrows (1) at the top. The Excel icon (2) at the bottom is a download link for the data. The 2 graph icons (3) in the data columns will display the data in a bar graph as seen below.



You can return to the report settings screen at any time by clicking on that button at the top right.



**Publishing a Report**

Publishing a report generates a URL and a QR code that you can use on your website or any other publicity documents. Just copy and paste the URL or the QR code into your document. Be sure you grab the entire URL. The box can be enlarged and it’s a good idea to do that just to be sure that you are getting the entire address.

Published reports are saved in the folder labeled Published Reports.



**PR Materials**

LibPAS gives us the option to create PR material templates such as brochures, bookmarks or posters. These documents pull data from your annual report into a document that you can download and further customize using Microsoft Word. To download a trifold pamphlet, just click on the folder labeled ME and then click on the Summary 2013 or Summary 2014 link.



If you have suggestions for the types of data you’d like to see included in this type of material, contact Stephanie Zurinski (stephanie.zurinski@maine.gov) or 207 287-5632.