Manage Reports

Report Managers and **Viewers** can access the **Manage Reports** screen and the Reporting functions therein. This includes access to all reports listed in the "Local > Report" folder and/or included in the various tabbed folders, as shown in the example below.


Note:
New LibPAS subscribers will find that their **"Report"** folder will be empty and **Report Templates** may or may not be offered depending on which Collections the user has authority to access.

The tabbed folders enable grouping of reports for ease of navigation and understanding. Report names are links and when selected enable execution and updating of Report settings.

Note:
Only **Report Managers** can create/modify/remove reports and create **Report Templates** or **Publish** reports.

Users with access to other "publicly" accessible data collections (e.g., IMLS, NCES, State/Provincial Data Collections, ACRL, PLDS, CULC, etc.) can also access any **Report Templates** created by the respective organizations that own the data collection. If a user's library is also a member of any of these organizations that offer these publicly accessible collections, the user will have access to each of the respective organizations folders (e.g., FL and PLA, as shown above). Access to these organization's folders provides access to the report folders shared with the members of that organization, including the **Report Templates** and **Published Reports** folders of that respective organization.
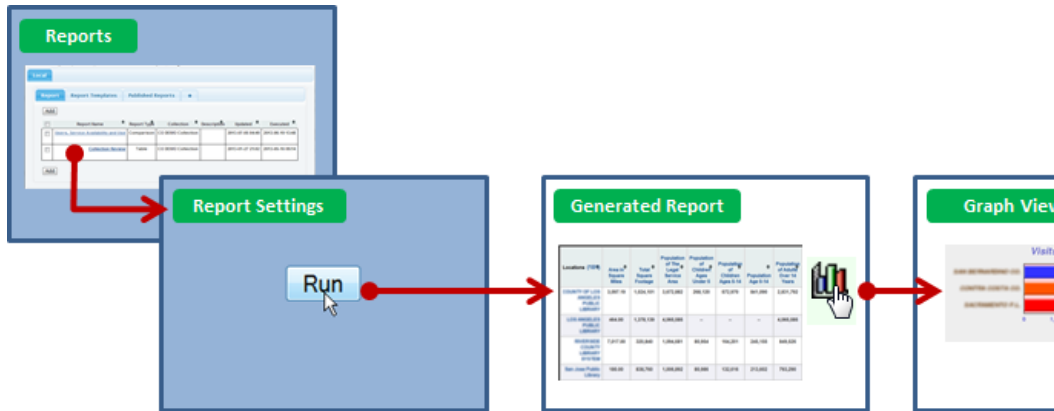
Clicking on the Report name for any report opens the "Report Settings" Screen and displays the report selections made for the selected report. Run the report to generate the output of results in the browser window. Some reports contain additional links to embedded content that enables drill-downs to additional details including access to pop-up charts/graphs and download of results. Content in chart/graphic format are represented by a graph icon. Clicking on a graph icon (as shown above) will present the chart/graph in a subsequent pop-up window.

Additionally, export/download icons indicate the file format for the information that can be saved locally. Clicking on these links will produce a downloadable file for viewing in the corresponding target program (e.g., Excel, Word, etc.).

The **Manage Reports** screen is essentially an online Reports filing cabinet with folder tabs to organize reports and provide access to template reports and previously published reports. From here, new reports can be created from scratch.

Report Managers can create new reports. Click "**Add**" in any "Local" folder or click an existing **Report Name (or Report Template)** in the **Manage Reports** screen and then update and save the new report settings by selecting the [Save as New Report] button. The "**Add**" report button will add the report within the folder open when you clicked "Add" unless the folder selection is changed in the **Report Settings** during the report's creation. The **Add Folder** button, denoted by the folder with the plus symbol (+), enables new folders to be added to the Manage Reports filing cabinet. As well, an 'Update folder" button in the selected folder allows the Report Manager to Update the Name, Description and Sequence of the folder.

Note:

Reports can only be added to the Report Template and Published Reports folders by clicking the [Save as New Template] or [Publish Report] buttons respectively in the Report Settings screen.

Remove Folders

Report Managers have the option to "Remove Folder". Only folders that do not contain any reports will have the "Remove Folder" option. To remove a folder that has reports included, these reports must be moved or removed first. Selecting "Remove Folder" immediately removes the folder.

Report Multi-Select, Remove and Move

All local report folders now include an option to multi-select all or any number of reports using the checkbox associated with each report. Selection of one or more reports reveals the options to Remove and Move reports. Multiple selected reports can be moved or removed en masse.

The header row also includes a "Check/Uncheck All" checkbox. Selection of the available [Remove] or [Move] buttons triggers the confirmation dialog box(es) to complete the request.

Users assigned the Report Viewer or Report Manager roles can access the LibPAS **Manage Reports** screen. Reports Managers can create and also remove reports. Removing a report removes any record of the report and its settings. Only Report Managers have the authority to remove reports, but the report to be removed must also be owned by the user's organization. Report Viewers are only able to run existing reports and temporarily change the settings of these reports.

Note:
Report Viewers can only view existing reports and temporarily revise the settings of these reports. Report Viewers are not able to save changes, create new reports and/or remove reports.

Remove
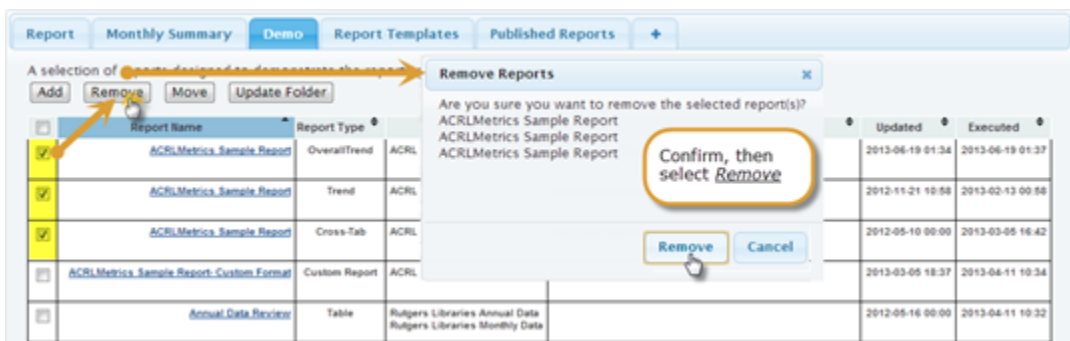
Move
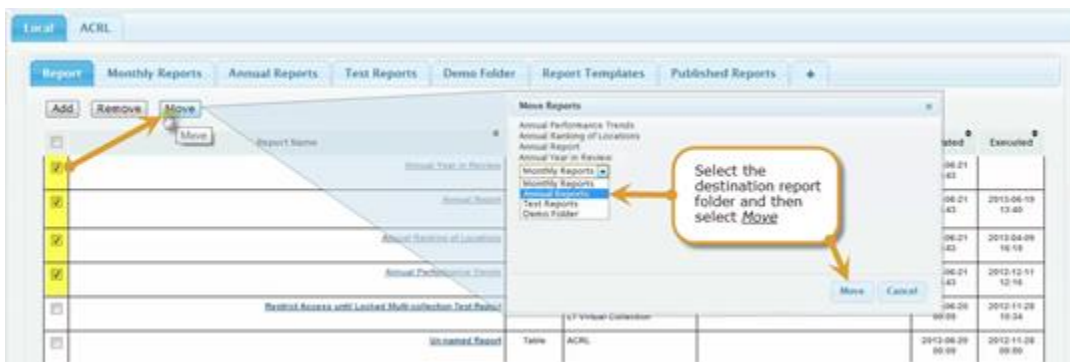
Column Sorting

The list of reports can be sorted. Select a column header to sort the rows (reports) by the content in that column. Selecting the header column again will toggle the sort order between ascending and descending.

Report Types

The Report Type (Table, Trend, Graph, Cross-Tab, etc.) selected in the **Report Settings** screen for the saved report is displayed in the **Report Type** column to readily help differentiate reports.

Report Templates and Published Reports

A Report Manager, if logged in for an organization that owns a Collection, can create report templates based on those Collections. Report templates are automatically added to the Report Templates folder. Template reports are accessible by any LibPAS user that has access to the Collection, including users at subordinate levels in the organization (unless other access restriction have been applied by the Collection Manager – see **Collection Access Restrictions**).

Report Managers can also Publish Reports. Published reports are automatically added to the Published Reports folder. Published reports have a unique URL assigned to them that can be used on any website, or distributed by email, for example. Published reports have the advantage that users accessing a Published report do not need to login to use the report, which makes sharing your report with a wider audience very easy.

Create a New Report

To create and set-up a new report, click on the "**Add**" button, as shown, found in the Local report folders at the top and bottom of the selected Local folder.

This will open the "**Report Settings**" screen as shown below. The report settings screen enables the selection of PIs from any available Collection.

To begin creating a report, select a Collection from the Collection select list, e.g. Systems Report, as shown above. Once a Collection is selected the screen will automatically refresh. Selecting a collection confirms the data source, the periods of data available and the PIs included in the data collection. These available PIs will appear in the select list (shown in the purple box – Step 4) for the selected Collection. To expedite the selection of PIs and to **Add** these to the Report, you can select a Group name from the Group select list to focus the list of PIs on those included in the selected Group. To add a PI to the report, select the PI by clicking on the PI name. The selected PI becomes highlighted. Click "**Add**" to add the PI to the **Report Settings**. You can also multi-select PIs in the PIs list by holding down the control key (command key for Apple users) when selecting PIs. Click "**Add**" to add all the selected PIs to the **Report Settings**. The selected PIs will be added in the same sequence order they appear in the data collection.

Multi-Collection (Data Source) Reports

You can also add PIs from more than one Collection. To do so, simply select a different Collection from the PI select list and add the PIs as appropriate.

Note:

LibSat subscribers can similarly add Customer Satisfaction data to their reports by selecting and adding the questions that relate to captured LibSat customer data.

Any PI added to a Report can be used as a filter, as highlighted below in the red and green boxes. For example, low, high or a low to high range of values can be set to provide filter criteria. The "% Filter Low >=" field can also be used to set a +/- percentage filter range. By setting the Filter Low value to 10% for example, LibPAS will filter values based on comparing the value for the current user's login location, such that all other locations with data values within +/-10% of that PI value will be included in the report output.

If you select the Report Type: Graph/PI, the Report Settings screen provides an additional option to add an "Overlay" on any Graph generated for a PI included in the report (see above). An overlay presents data from another PI as a line chart superimposed on the bar chart for the underlying PI. This visual "cross-tabulation" can help to convey the relationship between the values of two PIs. To add an overlay, simply click in the appropriate field in the Overlay column and then select the desired PI for the Overlay from the PIs in the PI select list offered in the pop-up window. In the example above, the PI for the expenditure on "Total Library Materials" (EXPLM) has been added as an Overlay to the PIs for "Volumes held" and "Current Serial Totals."

Report Options

Selection of the Options tab shows the various available report option settings (see below)

The various report Options control what is included/excluded from the report outputs. By default those options that are selected in the "Include" section are included in the report output (red box), and those options that are selected in the "Exclude" section are excluded from the report output (orange box). For example, the report output for the above settings would include: text PIs, My Location (the location associated with your login), Item No., Details (names of Library locations returned by the report), Summary data (including: Total, Average, Median); and the report would exclude: null entries, 0 Values, and Links (any dynamic linked content usually included in the report).

The following is a summary of the report options currently available.

Option	Description
Include:	Check option to include
Text PIs	Check this option to include the text PIs and associated data in the report output. If you only want numeric PIs and values included in the report output, leave this setting unchecked.
My Location	Check this setting to force the inclusion of your (login) library and associated values in the report.
Collection Owner	Check this setting to include the data collection owner's location and associated values in the report, e.g., ACRL is the owner of the ACRL data collection, or PLA is the owner of the PLA data collection.
Percentage Change	Check this option in the Trend/PI or Trend report to add the percentage change of values between each selected period included in the report.
Section/Group Name	Check this setting to add section/group names to the report. These group/section names are added as headers in the report and show which group/section the PI belongs to in the data collection.
Item No	Check this setting to add Item No. prepended to the PI name field.
Notes	Check this setting to add notes (annotations about values included in the report) as a footnote to the report.
Definitions	Check this setting to add definitions for the selected data elements as a

	footnote to the report.
Details	Check this setting to include the location names and values in the reports. If any of the Summary options (below) are selected, then unchecking this setting will exclude the location names and values from the report but the Summary values will still be included for those locations included in the scope of the report.
Summary	Check/Uncheck to toggle inclusion/exclusion of Summary data options.
Total	Check this setting to add total values to the report.
Responses (N)	Check this setting to add N - number of responses to the report.
Avg (Average)	Check this setting to add AVG value to the report.
Max (Maximum)	Check this setting to add MAX value to the report.
Min (Minimum)	Check this setting to add MIN value to the report.
Median	Check this setting to show Median value to the report.
25th Percentile	Check this setting to show 25th percentile value to the report.
75th Percentile	Check this setting to show 75th percentile value to the report.
Exclude:	Check option to exclude
Header	Check to hide the header on report
Null Entries	Check to exclude locations with only null values
0 Values	Check to exclude locations with only zero values
Derivatives Totals / Avgs (Averages)	Check to exclude summary total and average value for the derivative PIs
Filter Settings	Any filters used are displayed by default. Check this entry to exclude from the generated output
Links	Disables all links in reports that feature drill-down, download and pop-up links. Useful when only printing and/or embedding report outputs.

Results Filtering

Any PI added to a Report can be used to filter records. Plus/Minus Percentage (%) filter ranges, Minimum and/or Maximum values can be defined. Filter settings ensure that only records with values that meet the filter criteria are included in the results. The "% Filter Low >=" field is where a percentage range filter can be applied. By setting the "% Filter Low >=" value to 5% for

example, LibPAS will filter based on the data value for the user's login location and returns data records within +/-5% of that PI value (e.g., Value = 100,000; Percentage Filter = 5%; Filter Range is 95,000 ⩾ X ⩽ 105,000).

It is also possible to filter records based on the text elements (.g., Library name (shown below), County, etc.). Hover over the corresponding text box and mouse-click to open the filter settings pop-up window. Select (highlight) the listed choices required for your filter. Then, **click Update when you are done.**

Report Types

LibPAS offers many different Report Types that give different views of the data. Most tabular report types feature graph icons to pop-up graphs for the selected results and downloadable Excel files enabling off-line analysis and reporting, and or archiving.

Table Report – The Table report provides a summary view of the data by reporting location for a given period. The report features interactive column sorting, pagination options, and graph icons linked to ranked bar chart views as well as an Excel download. Results for your location are highlighted (a different color is used) in the tabular and graph outputs, for ease of identification and comparison. Options include the inclusion of; summary data (e.g., Avg,

Median, Max, Min, Total, N), notes, group names, definitions, etc. or the exclusion of; Null Entries, 0 Values, Header, etc.

Example Table Report

Holdings, Staff, Income and Expenditures

Collection: **PLDS** Period: **FY2012, Start 2012-01** Months: **12**

Locations (10)	2.a Population of legal service area	4. Holdings	19. Total income	24. Total operating expenditures (total of items 20-23)	City
BUFFALO AND ERIE COUNTY PUBLIC LIBRARY	919,040	4,321,188	$26,981,629	$25,752,558	Buffalo
COLUMBUS METROPOLITAN LIBRARY	850,548	1,715,531	$173,503,070	$56,065,780	Columbus
FRESNO COUNTY PUBLIC LIBRARY	919,379	1,179,665	$24,799,820	$25,009,419	Fresno
GWINNETT COUNTY PUBLIC LIBRARY SYSTEM	842,046	1,089,647	$18,662,650	$19,187,838	Lawrenceville
INDIANAPOLIS-MARION COUNTY PUBLIC LIBRARY	877,389	1,947,443	$40,726,116	$37,322,982	Indianapolis
JACKSONVILLE PUBLIC LIBRARY	879,602	2,848,782	$40,137,012	$39,042,409	Jacksonville
KERN COUNTY LIBRARY	846,883	1,080,377	$7,526,948	$7,474,461	Bakersfield
PALM BEACH COUNTY LIBRARY SYSTEM	848,029	1,912,487	$40,574,770	$39,081,834	West Palm Beach
SAINT LOUIS COUNTY LIBRARY	859,148	2,062,482	$37,128,319	$36,944,624	St. Louis
WAKE COUNTY PUBLIC LIBRARIES	907,314	1,553,228	$19,652,825	$19,319,006	RALEIGH
	Total	8,749,378	19,710,830	$429,693,159	$305,200,908
	Avg	874,938	1,971,083	$42,969,316	$30,520,091
	Max	919,379	4,321,188	$173,503,070	$56,065,780
	Min	842,046	1,080,377	$7,526,948	$7,474,461
	Median	868,269	1,814,009	$32,054,974	$31,348,590

FILTERS	VALUES	
	MIN / %	MAX
POPULATION OF LEGAL SERVICE AREA	5%	

Table Report Tips:

Display more libraries: At the bottom of the report, increase the number of records per page

Sorting: Click on the arrow at the top of any column to sort libraries, i.e. by population size, etc. Shift-Hold, Mouse-Click allows data to be sorted by multiple selected columns sorted by the sequence of selection and sort direction selected in that sequence.

Printing: For larger print-outs adjust your "Page Setup" i.e. "Legal" or "Landscape" or download the results into Excel and further adjust the format.

Bar graphs: To enlarge a bar graph click on "Expand" icon. To print or embed bar graphs in other documents, right-click on the graph and Save to a local folder or use the copy image feature (if available with your browser) to copy-and-paste into another document.

Table Report Features

PI Report – PI Reports present the data for each selected PI in a rank ordered table, including summary data for the selected PIs (performance indicators) and Period. By default, the output includes the Average (mean), Total, Variances and Quartiles for the selected PI(s). As well, summary data Options can be added and the sequence and prompts used can be customized as desired.

Example PI Report

	4. Holdings	
1	KERN COUNTY LIBRARY	1,080,377
2	GWINNETT COUNTY PUBLIC LIBRARY SYSTEM	1,089,647
3	FRESNO COUNTY PUBLIC LIBRARY	1,179,665
4	WAKE COUNTY PUBLIC LIBRARIES	1,553,228
5	COLUMBUS METROPOLITAN LIBRARY	1,715,531
6	PALM BEACH COUNTY LIBRARY SYSTEM	1,912,487
7	INDIANAPOLIS-MARION COUNTY PUBLIC LIBRARY	1,947,443
8	SAINT LOUIS COUNTY LIBRARY	2,062,482
9	JACKSONVILLE PUBLIC LIBRARY	2,848,782
10	BUFFALO AND ERIE COUNTY PUBLIC LIBRARY	4,321,188
	Total	19,710,830
	Avg	1,971,083
	Max	4,321,188
	Min	1,080,377
	Median	1,814,009
	Lower Quartile - 25%	2,062,482
	Upper Quartile - 75%	1,179,665
	Variance - 25% above average	2,463,854
	Variance - 25% below average	1,478,312

Ranked sort order. Sort direction can be set in report settings.

Optional Summary data included

Lower (25%) and Upper (75%) Quartile Range.

Variance range (highlighted in grey above) for upper and lower range: 25%above and 25% below average

Graph/PI – Displays the values for the PIs in a bar graph sorted by PI value in ascending or descending order. The sort direction is set on the report settings screen by clicking the

directional arrow related to each PI selected. This report type supports the use
of overlays as shown below.
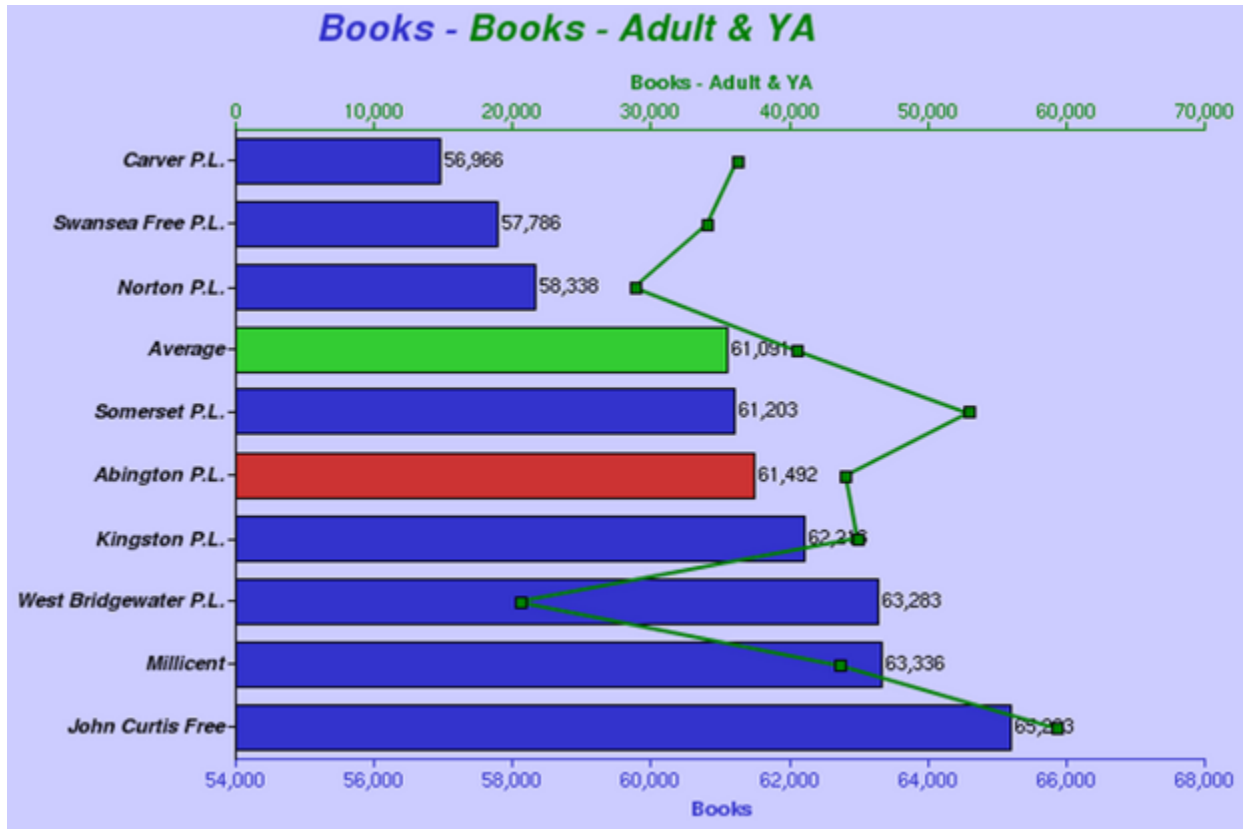
Graph/PI Overlays

The Graph/PI report type provides a setting for an "Overlay" that can be displayed on each
generated bar graph. The overlay results appear as a line superimposed on the generated bar
graph, with the scale for the overlay along the top axis, and the scale for the bar graph along the
bottom. This visual "cross-tabulation" can help to visualize the relationship between values of
two PIs. To create an overlay, simply click in the appropriate Overlay field to get to the pop-up
screen where you can select the desired PI to overlay. In the example (below) the PI for "Books
- Adult & YA" circulation (ADYABOOKCI) has been added as an Overlay to the PI for "Books"
holdings.

Summary – The Summary report compiles a summary view of each PI included in the report for the chosen period detailed by the selected summary data options (e.g., Total, Average, Max, Min, Median) selected in the Option tab. The summary values reflect the data returned for those libraries included within the scope of the report settings (e.g., as shown below, those libraries having a population served +/- 5% of the Population of Legal Service Area reported by the Library associated with the user login).

Holdings, Income and Expenditures

Collection: **PLDS**   Period **2012**

Name	Total	Avg	Max	Min	Median
4. Holdings	19,710,830	1,971,083	4,321,188	1,080,377	1,814,009
19. Total income	$429,693,159	$42,969,316	$173,503,070	$7,526,948	$32,054,974
24. Total operating expenditures (total of items 20-23)	$305,200,908	$30,520,091	$56,065,780	$7,474,461	$31,348,590

FILTERS	VALUES	
	MIN / %	MAX
POPULATION OF LEGAL SERVICE AREA	5%	

Summary Graphs – The Summary graph report (a box and whiskers diagram) presents the spread of values recorded by those Libraries within the scope of the report. The result is a comparative picture for the selected PI(s) for the chosen period for the login Library relative to the value this Library has reported. There are markers for the minimum, maximum, and average values. The red box represents where 50% of the results fall between the 25th and 75th percentile. See below.

Holdings, Income and Expenditures

Collection: **PLDS**   Period **2012**

Value reported by login library

4. Holdings

Total	19,710,830	Avg	1,971,083	Max	4,321,188	Min	1,080,377	Median	2,848,782

Scale: 0 | 500,000 | 1,000,000 | 1,500,000 | 2,000,000 | 2,500,000 | 3,000,000 | 3,500,000 | 4,000,000 | 4,500,000 | 5,000,000

Markers: Min, Avg, Max

19. Total income

Total	$429,693,159	Avg	$42,969,316	Max	$173,503,070	Min	$7,526,948	Median	$40,726,116

Scale: 0 | 20,000,000 | 40,000,000 | 60,000,000 | 80,000,000 | 100,000,000 | 120,000,000 | 140,000,000 | 160,000,000 | 180,000,000 | 200,000,000

Markers: Min, Avg, Max

24. Total operating expenditures (total of items 20-23)

Total	$305,200,908	Avg	$30,520,091	Max	$56,065,780	Min	$7,474,461	Median	$39,081,834

Scale: 0 | 5,000,000 | 15,000,000 | 25,000,000 | 35,000,000 | 45,000,000 | 55,000,000 | 65,000,000

Markers: Min, Avg, Max

FILTERS	VALUES	
	MIN / %	MAX
POPULATION OF LEGAL SERVICE AREA	5%	

25th Percentile ← Range → 75th Percentile

Trend/PI – The Trend/PI report displays the data for the chosen PIs over the selected range of periods. This report also features a click only graph of the data. As shown below, if the scope of the report includes more than 8 libraries with data, the graph view is presented as a bar and whiskers plot showing the min, average, max values in the range, as well as the 25th to 75th percentile range (pink box). The login library values are then plotted as a trend line to show how the login library compares to the range.

4. Holdings	FY2009	FY2010	FY2011	FY2012
BUFFALO AND ERIE COUNTY PUBLIC LIBRARY	3,431,653	3,435,579	3,211,709	4,321,188
COLUMBUS METROPOLITAN LIBRARY	2,185,192	2,146,370	2,097,447	1,715,531
FRESNO COUNTY PUBLIC LIBRARY	1,442,151	1,472,143		1,179,665
GWINNETT COUNTY PUBLIC LIBRARY SYSTEM	1,059,382	1,186,120	1,104,382	1,089,647
INDIANAPOLIS-MARION COUNTY PUBLIC LIBRARY	1,919,059	1,844,291	1,830,268	1,947,443
JACKSONVILLE PUBLIC LIBRARY	3,147,971	3,023,307	2,875,295	2,848,782
KERN COUNTY LIBRARY	1,097,405	1,112,854	1,162,441	1,080,377
PALM BEACH COUNTY LIBRARY SYSTEM			1,725,279	1,912,487
SAINT LOUIS COUNTY LIBRARY	2,086,973	2,015,921	2,019,806	2,062,482
WAKE COUNTY PUBLIC LIBRARIES	1,714,402			1,553,228
TOTAL	18,084,188	16,236,585	16,026,627	19,710,830
N	9	8	8	10
AVG	2,009,354	2,029,573	2,003,328	1,971,083
MAX	3,431,653	3,435,579	3,211,709	4,321,188
MIN	1,059,382	1,112,854	1,104,382	1,080,377
MEDIAN	1,919,059	1,930,106	1,925,037	1,814,009

As shown below, if the scope of the report includes less than 8 libraries the graph view is presented as a line chart where the login Library location has the thicker line among the others.

4. Holdings	FY2009	FY2010	FY2011	FY2012
JACKSONVILLE PUBLIC LIBRARY	3,147,971	3,023,307	2,875,295	2,848,782
COLUMBUS METROPOLITAN LIBRARY	2,185,192	2,146,370	2,097,447	1,715,531
INDIANAPOLIS-MARION COUNTY PUBLIC LIBRARY	1,919,059	1,844,291	1,830,268	1,947,443
SAINT LOUIS COUNTY LIBRARY	2,086,973	2,015,921	2,019,806	2,062,482
TOTAL	9,339,195	9,029,889	8,822,816	8,574,238
N	4	4	4	4
AVG	2,334,799	2,257,472	2,205,704	2,143,560
MAX	3,147,971	3,023,307	2,875,295	2,848,782
MIN	1,919,059	1,844,291	1,830,268	1,715,531
MEDIAN	2,136,083	2,081,146	2,058,627	2,004,963

Trend Reports – Trend reports enable comparison of results spanning multiple periods. The range can span any number of periods defined by the data collection selected. Trend reports support various Options including Details and Summary data: number of respondents (N), the Average (mean), Min and Max values, Median and Total values.

Trend	FY2009	FY2010	FY201
A. GENERAL INFORMATION			
4. Holdings			
JACKSONVILLE PUBLIC LIBRARY 📊	3,147,971	3,023,307	2,875,295
COLUMBUS METROPOLITAN LIBRARY 📊	2,185,192	2,146,370	2,097,447
INDIANAPOLIS-MARION COUNTY PUBLIC LIBRARY 📊	1,919,059	1,844,291	1,830,268
SAINT LOUIS COUNTY LIBRARY 📊	2,086,973	2,015,921	2,019,806
TOTAL 📊	9,339,195	9,029,889	8,822,816
N 📊	4	4	4
AVG 📊	2,334,799	2,257,472	2,205,704
MAX 📊	3,147,971	3,023,307	2,875,295
MIN 📊	1,919,059	1,844,291	1,830,268
MEDIAN 📊	2,136,083	2,081,146	2,058,627

The Trend report can include different report options, select the Options tab to customize Trend reports. The example above shows a variety of Summary data options included. This report can be customized to provide a Summary version that does not include the details of each Library location and only shows the Summary data values for the selected range of periods. This is achieved by de-selecting "Details" in the report settings Options tab. Below shows the result of this report not including the details.
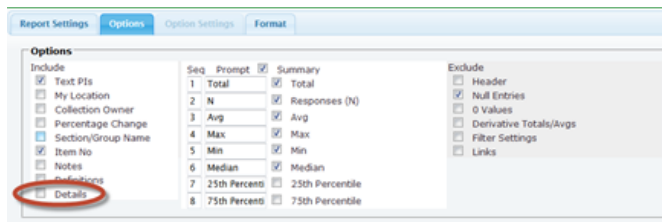
Trend report without the "Details" of each Library and including only the selected Summary data options

Trend	FY2009	FY2010	FY2011	FY2012
A. GENERAL INFORMATION				
4. Holdings				
TOTAL 📊	9,339,195	9,029,889	8,822,816	8,574,238
N 📊	4	4	4	4
AVG 📊	2,334,799	2,257,472	2,205,704	2,143,560
MAX 📊	3,147,971	3,023,307	2,875,295	2,848,782
MIN 📊	1,919,059	1,844,291	1,830,268	1,715,531
MEDIAN 📊	2,136,083	2,081,146	2,058,627	2,004,963

The reports feature pop-up graphs (graph icon). Select the graph icon in any row to view the chart for the corresponding row of data, as shown below.

Trend	F
A. GENERAL INFORMATION	
4. Holdings	
JACKSONVILLE PUBLIC LIBRARY	
COLUMBUS METROPOLITAN LIBRARY	
INDIANAPOLIS-MARION COUNTY PUBLIC LIBRARY	
SAINT LOUIS COUNTY LIBRARY	2,
TOTAL	9,33
N	4
AVG	2,334,79
MAX	3,147,971
MIN	1,919,059
MEDIAN	2,136,083

(The MAX, MIN, MEDIAN rows also show additional columns: 3,023,307 / 2,875,295 / 2,848,782; 1,844,291 / 1,830,268 / 1,715,531; 2,081,146 / 2,058,627 / 2,004,963)

4. Holdings — Jacksonville Public Library trend bar chart: FY2012 2,848,782; FY2011 2,875,295; FY2010 3,023,307; FY2009 3,147,971.

In the example Trend graph (above) the pink shading in the background represents the average value. Above average results are shown by the Blue bars, while below average results are shown in red.

Period Comparison – Period comparison reports compare results for two selected periods. This Report Type shows values for each Period and the Gap (difference). Various Graph icons exist for generating graphs displaying the results of each period and or the differences between each period, including Plus/Minus and Comparative bar charts.

Locations – 5	Books (Total Holdings)			Total books circulation (Total Circulati		
	2011		2010	2011		
West Bridgewater Public Library	63,283	1.41%	62,402	39,954	-9.93%	44,361
Kingston Public Library	62,216	5.32%	59,071	82,285	-5.13%	86,730
Abington Public Library	61,492	-0.02%	61,506	72,475	-6.96%	77,897
Somerset Public Library	61,203	0.15%	61,114	82,368	0.59%	81,886
Norton Public Library	58,338	2.80%	56,750	58,077	-2.12%	59,335

Total books circulation: 2011 vs 2010 (Percentage) comparative bar chart for West Bridgewater P.L., Abington P.L., Kingston P.L., Norton P.L., Somerset P.L.

PI Gap – The PI Gap Report is useful in comparing data from two data elements. The paired comparison of PIs in the report output is determined by their Sequence value in the Report settings screen (1:2; 3:4; 5:6, etc.).

Locations – 7		1 Books vs 1 Total books circulation			5 E-book holdings vs Total Ebooks circulation		
Hanover - John Curtis Free Library	65,203	-20.3%				8.1%	335
Fairhaven - Millicent Library	63,336	-7.6%					1,420
Kingston - Kingston Public Library	62,216	-24.4%					
Abington - Abington Public Library	61,492	-15.2%					
Somerset - Somerset Public Library	61,203	-25.7%					
Swansea - Swansea Free Public Library	57,786	19.9%					
Carver - Carver Public Library	56,966	-11.9%					

The PI Gap Report also features downloadable Excel results, and click-only icons to pop-up graphs similar to the Period Comparison report.

Cross Tab – A Cross Tabulation Report compares a range of results for one PI versus another. You can generate several cross tab tables in one report. Each selected PI in the report is compared against the first PI (defined by Sequence.) The Cross Tab Report provides counts and percentage values of row and column totals in each cell of the report. Cross Tab Reports also feature links, from the counts, that enable a drill-down to a listing of the corresponding locations and their values for the PIs in the Cross-Tab.

To create a Cross Tab Report you will need to create a report and then setup Group breakouts for the Cross Tab report, see the image below.

Locations		Filters					
Locations		Abington Public Library|Acton Memorial Library|West Acton Citizens\' Library|Russell Memoria					
Indicators	Value	% Filter Low >=	<= Filter High	Group		Sequence	Remove
Massachusetts Collection							
General Information							
☑ County	BR|PL			Group		3	✖
Total Holdings							
☑ 1 Books	61,492	10%		Group		1	✖
☑ 5 E-books	1,649	1000	2000	Group		2	✖

Once you click on the Group link you can set the groups you would like to use to breakout the data.

Custom Format – Custom Format Reports provide you with more customizable options including the ability to style the output using Cascading Style Sheets (CSS.) Custom reports also provide a unique URL link that can be inserted into any merge document; thus providing users with a way to integrate results directly into custom formatted Documents (e.g., Word, Excel, etc.). Each time the Document is opened, the most recent data can be fetched from LibPAS. This feature is very useful for auto-creation of standard Monthly, Quarterly and Annual reports that typically include several Custom Reports throughout the Document.

Custom Format Reports and Merging

Custom reports offer numerous options to control the content, style (using CSS) and layout/orientation of LibPAS report outputs.

To create a document that combines data from multiple reports (for example an annual or monthly report combining several graphs/charts), you can merge data from more than one LibPAS report into Word or Excel document(s) (similar to a traditional mail merge). Using this Document Merge functionality, you have the ability to re-use the Document "Template" every time you wish to produce the report. Merged documents use the latest data from LibPAS.

To create a custom merge report, the Custom Format report type is selected and options are set in the Report Settings, Options, Option Settings and Format tabs for the report. These settings determine the content included in the report, including: prompts (titles, report name/description, period labels); range and the scope of the information to presented (number of data points); optional inclusion/exclusion of information and report parts (e.g., column and/or row headers); report orientation (e.g., Column: PIs X Row: Locations or Columns: Locations X Rows: PIs); addition of Column and/ or Row totals; as well as desired formatting of the content.

While it is easy to create, layout and format the Custom Format reports online and view the outputs of this report, the need to merge the formatted output in the appropriate offline

document must be considered as part of the report design at some point to achieve the desired final results, especially when printing is the ultimate requirement. Consideration must be given to the final output media including: page size; margins; page text area; alignment/justification; paragraph and line spacing, headings, fonts, column widths, row heights, boarders, cell padding, etc.) In most cases the desired formatting can be achieved using CSS in the Format tab, however there are times when formatting may be handled best in the word processing document itself, e.g., Word.

Table Title				
Report Name	Header 1		Header 1	
	Header 2		Header 2	
Report Description	Header 3	Header 3	Header 3	Header 3
Row Label	Data	Data	Data	Data
Row Label	Data	Data	Data	Data
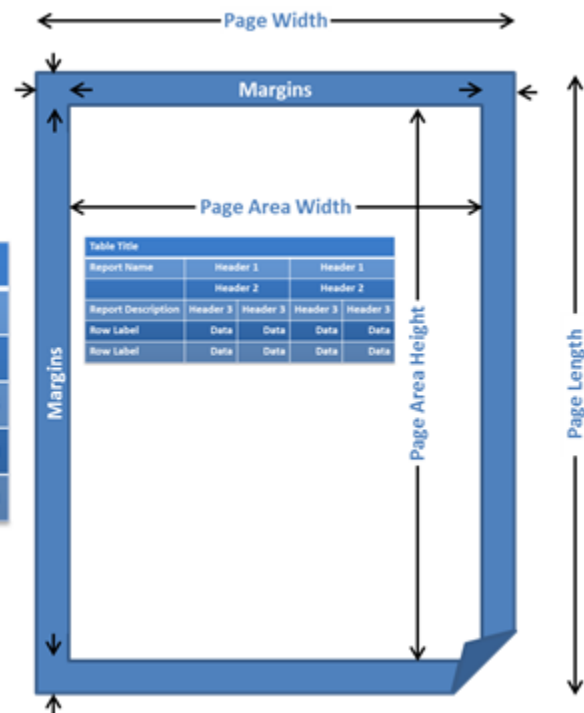
The preceding graphic shows the typical layout of the Custom Format table report output with prompts related to the output options and a suggestion of how this report might fit within a typical document page. Many of the LibPAS reports, and the Custom Format report, support multiple columns and rows of data, however for a table to be sized appropriately and the content to be legible, consideration will need to be given to the limitations of the target document.

To produce your report:
Create a New Report or Select any one of your existing reports.

Note: Some consideration will have to be given to the content of the report output prior to merging with Word or Excel due to the possible constraints of the final desired output, such as printed pages.

The Report type for the report should be set to "**Custom Format**" Report.

The following instructions are based upon the Programs by Age Group report from the Alachua County Library District (Public Library), which they have given us permission to share. The Report Settings for this Custom Format report are shown below.

In the Report Settings notice that the Custom Format has been selected for the Report (red arrow), and …

1.   The Options included are as follows: Current Month, Current YTD (Year-to-date), Prior Month (i.e., same month prior year), and Prior YTD (i.e., year to date for the same range of months, but for the prior year).

2.   The Prompts (i.e. Labels) related to these options have been assigned. Note: If for example the report Period is changed to September 2011, then the Current Month prompt should be changed to September as well as Prior Month prompt should be changed to September.

3.   A Title for this report has been given. This title will automatically be added to the report table in the header row.

Other options have been applied to this report.

In the report Options tab, include Total has been checked, as well, exclude Null Entries and 0 Values has been checked.

This means that the report will add a row to the table report which totals the data in each column and if a library that has no data (null values) or input zeros for all variables, this library will be excluded from the report output.

As well in the Options Settings tab, a Title for the Column Total has been set, Total and the orientation of the table has been set to show each location (library name) listed in the first column (i.e. row headers) and the PI names to be listed in the Column headers.

Note: If in the Options tab you have not selected Total in the Summary data options, you can simply add the prompt Total to the Row Total field in the Option Settings tab and this will have the same effect to add a Total row to the report table.

Formatting the report

LibPAS enables users to format report outputs using CSS. In the Format tab of the Report Settings screen as user can modify the CSS codes to change any of the formatting in the report output. Table and column widths can be set. Font sizes and colors can be altered including cell background colors. Or borders can be added and removed.

If you are unfamiliar with CSS there are a number of tutorials and instructional resources available online. Otherwise you might consult with a staff member in your Library system that has experience with CSS codes.

The CSS formatting codes for the Programs by Age Group report (below) are provided at the end of this document for your reference.

Running the Report

After you run the Custom format report you will find there is a URL provided immediately below the Report Table. This URL can be embedded and merged with an MSWord document, as shown on the following page, or similarly in an Excel document using the Get External Data function From Web.

Merging a LibPAS report with MS Word 2007/2010
Step 1

Open the document in which you want to merge your report (i.e., insert a field). Or you can open a new, blank document and start from scratch. Click on the space where you want your field, so that your cursor is right in the spot where you want your inserted field to appear.

Step 2
Click Insert on the toolbar, then click Quick Parts, and then click Field. The Field dialog box will open. On the left-hand side of the dialog, you will notice that under Please Choose a Field there is a Categories drop down. Choose Links and References from the drop-down menu.

Step 3
Click on IncludeText in the Field Names box. In the Field Properties section, insert your cursor in the Filename or URL field and type or paste the URL provided by LibPAS for the report.

For example, the report URL might be -
http://www.countingopinions.com/pireports/report.php?rkey=9d58cd8dc7144bb53391af3ef22820b5&rid=2464

Note: This is an active report URL and will work if merged in a Test document.

Step 4
Uncheck the Preserve formatting during updates check box. This means that the online source formatting will take precedence over any internal Word document formatting. Leaving this option checked can cause some unpredictable formatting issues.

Step 5
Click OK when you have chosen the field you want to insert and any properties or options. Save the changes to your document, so that the next time the document is used the fields will be available.

Here are the detailed steps in Word

In the ribbon, under the Insert tab you will find the tool called Quick Parts among the Text group. Click on Quick Parts allowing the list of option to expand, and then select Field… as shown (below).
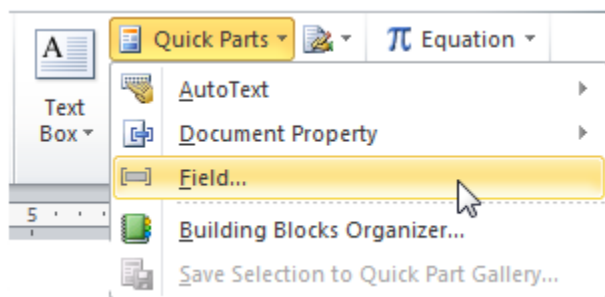
This will open a dialog window called Field. In this dialog window, navigate and select Links and References from the Categories list (as shown below).

After you select Links and References the dialog will automatically refresh to display a list of Field names related to Links and References.

Step 1 - In the Field names list, select the field name IncludeText. Again the dialog refreshes. Field properties is now shown and an empty field for Filename or URL: is presented.

Step 2 - Please copy and paste in this field the entire report URL found in the output view of the Custom Report.
For example,
http://www.countingopinions.com/pireports/report.php?rkey=9d58cd8dc7144bb53391af3ef22820b5&rid=2464
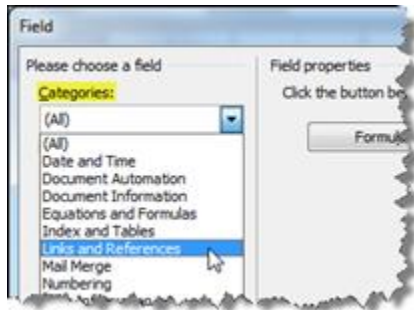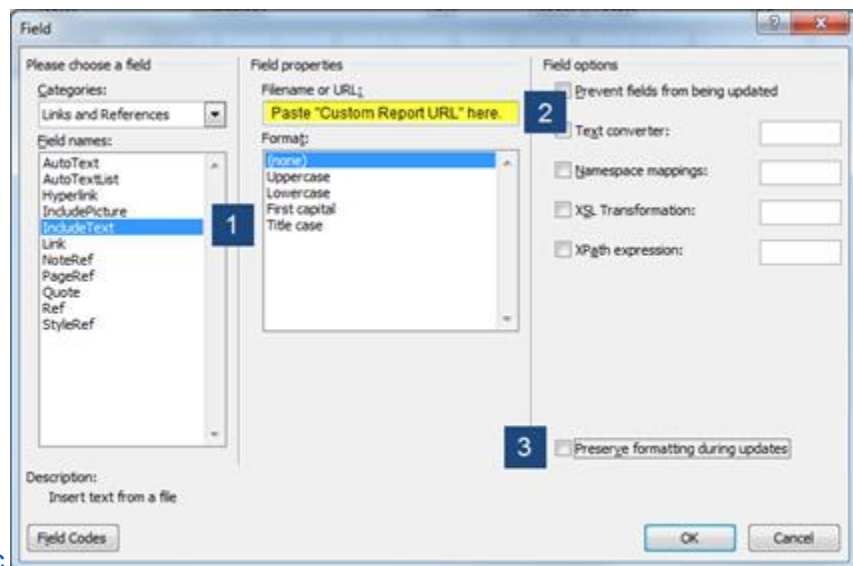

Step 3 – Uncheck Preserve formatting during updates. This allows the formatting created online in the Format tab of the report to take precedence over the Word document formatting.

Merging a LibPAS report with MS Word 2003
Please refer to the following MS Office online help –
http://office.microsoft.com/en-us/word-help/insert-a-field-HP005189388.aspx

Update the Report

If you have already embedded a Custom Report, click on a cell in the report table in your document. This will highlight the entire report table. You can either press 'Function 9'(F9) on

your keyboard, or click your right mouse button while still in the table, which will offer a menu of options, then click Update field as shown to the right. After pressing F9 or clicking update field, if you have updated the report settings online and saved these settings, you should see the report table automatically update in your Word document.
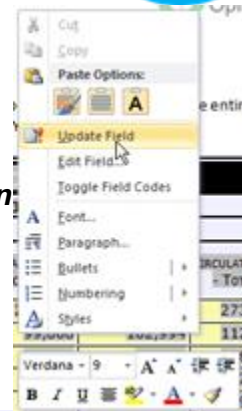
Note PC Users -- You can update an entire document of embedded tables by performing the following keyboard shortcuts – CTRL-A then press F9 on your keyboard.

Below is a representation of what the Custom Report would look like merged with a Word document. (Google Docs does not currently support this feature).

PROGRAMS BY AGE GROUP

PROGRAMS		CURRENT YEAR (2010-2011)						PRIOR YEAR (20		
		AUGUST			YTD			AUGUST		
AGES	19 +	12-18	0 - 11	19 +	12-18	0 - 11	19 +	12-18	0 - 11	
HEADQUARTERS	18	7	10	231	76	295	16	7	4	
HOMEBOUND										
ALACHUA	20	8	8	205	115	128	16	9	12	
ARCHER	6	0	0	58	0	59	7			
EBRANCH										
HAWTHORNE	4	5	14	108	54	163	4	3	13	
HIGH SPRINGS	8	1	18	86	30	212	7	4	16	
LIBRARY PARTNERSHIP	11	1	15	179	26	157	32	3	15	
MICANOPY	2	1	5	11	10	80	1	0	4	
MILLHOPPER	15	11	22	152	90	201	8	8	16	
NEWBERRY	3	1	7	33	34	121	1	4	12	
TOWER ROAD	12	2	6	117	50	150	20	3	5	
WALDO	0	0	1	1	0	22	4	0	0	
BOOKMOBILE 1	0	0	2	2	0	11	0	0	0	
BOOKMOBILE 2	0	0	0	3	0	14	0	0	0	
DEPOSITS										
DOWNLOADABLES										
JAIL	5	4		131	32		23	1		
OUTREACH	0	0	0	0	0	0				
SUBTOTALS	104	41	108	1,317	517	1,613	139	42	97	1,

*Shared with permission from Alachua County Library District.

<u>Create a new Web query</u>

Step 1
In Microsoft Office Excel, on the Data tab, in the Get External Data group, click From Web.
In the browser, browse to the Web page from which you want to query the data, right-click the Web page, and then click Export to Microsoft Excel on the shortcut menu.

The New Web Query dialog box appears.

Step 2
In the New Web Query dialog box, enter the URL for the Custom Report page from which you want to get data. You can type the URL or paste it from a copied address.

Step 3
Click the ➡ button next to the tables that you want to import, or click the ➡ button in the upper-left corner of the page to import the entire page.

Tip - If there are no ➡ buttons next to the tables on the page, click **Show Icons** ➡ at the top of the dialog box to display them.

<u>Formatting Options</u>
To set the formatting and import options for how data is returned, click Options, and then do one or more of the following in the Web Query Options dialog box:

Under Formatting, click one of the following:

None
This option returns none of the formatting on the Web page that you are querying, only text. Formatting that exists on the Excel worksheet is applied.

Note: This is ideal for a merge of "raw data"

Rich text formatting only
This option returns the type of formatting that Excel can reproduce most closely, such as font styles. It does not include HTML formatting, such as hyperlink formatting.

Note: This is ideal for importing the online formatting you have added to the Formats tab of the Custom Report.

Full HTML formatting

This option returns all HTML formatting that Excel supports, such as hyperlink formatting.

Note: This option clears the Preserve cell formatting check box in the External Data Range Properties dialog box.

[Click for more instructions from Microsoft Office](#).

Appendix A: Programs by Age Group - CSS Codes

```
body {
        width: 100%;
                font-family: verdana, arial, helvetica, sans-serif;
                font-size: 9pt;
                background-color: #ffffff;
                margin: 0;
                padding: 0;
}
legend {
                font-size: 9pt;
                font-weight:bold;
                color: #0577B4;
}
.main {
                background-color: #fff;
                font-family: verdana, arial, helvetica, sans-serif;
                color:#000;
                font-size:9pt;
}
.rperiod {
                background-color:#fff;
                font-family:Bodoni MT Black,sans-serif;
                color:#000;
                font-size:14pt;
                text-align:center;
                font-weight:bold;
                text-transform:uppercase;
}
table.tblreport {
                width: 7in;
                background-color: rgb(240,240,270);
                font-family: verdana, arial, helvetica, sans-serif;
                color:#000;
```

```
                font-size:9pt;
            font-variant: small-caps;
}
.tbltitle {
                font-weight:bold;
            font-size:16pt;
            font-variant: small-caps;
                text-align:left;
}
.tblreportname {
                font-weight:bold;
            font-size: 14pt;
            text-align:left;
            border-bottom:1.5pt black solid;
}
.tbldescription {
                text-align:right;
}
.tblperiod, .tblperiod1 {
                font-weight:bold;
            text-align:right;
}
.tblperiod2 {
                font-weight:bold;
            text-align:center;
            border-bottom:1.5pt black solid;
}
.tblperiod3 {
                font-weight:bold;
            text-align:center;
}
.tblpiname, .tblpiname1, .tblpiname2, .tblpiname3 {
                text-align:right;
             border-left: thin black solid;
}
.tblcolumn1 {
                text-align:left;
}
.tbldata {
                text-align:right;
             border-left: thin black solid;
             border-top: thin black solid;
                background-color: rgb(250,250,170);
}
```

```
.tbltotal {
            text-align:left;
            font-weight: bold;
}
.tbltotals {
            text-align:right;
            font-weight: bold;
}
tr.tbltotalrow td {
            border-top:thin black solid;
}
```

Published Reports – All reports can be published and shared with others by sending via email, text message, twitter or posting on a website or blog. You can also use the QR-Code feature to post links to reports in print materials. Users are not required to login to see the results and can use all the interactive features supported in the reports (e.g., downloads, pop-up graphs, drill-downs)

For more information and instruction on how to use the LibPAS reporting tools, please refer to the online "Help" linked from the top right corner of most screens.

If you have any questions regarding the setup and function of the LibPAS reports, please contact support@countingopinions.com.