

INSTRUCTIONS FOR SUBMITTING ARL STATISTICS DATA ONLINE

Overview & General Instructions

The ARL Statistics Web interface is used for data entry, automatically performs many required math functions, and generally provides for simpler, faster, and more accurate submission of data to ARL. Below is a general overview of the data submission process:

Step 1: Review Your Users and Your Survey Settings

Step 2: Monitor and Complete Data Entry

Step 3: Review and Submit Data

For the ARL Statistics submittal process, there are two classes of individuals: Primary Contacts and Users. These are defined below.

- **Primary Contact** – an institution’s designated point person for a particular survey (ARL Statistics, Preservation Statistics or Supplementary Statistics). This person is responsible for defining who the system users are for a particular survey and the library branches that will report data. The primary contact is exclusively responsible for the completion of steps 1 and 3 of the submittal process outlined above. These individuals should read this document in its entirety.
- **Users** – these are all other members of an institution’s staff who are involved in the data submittal process or any staff member who may be added to the system to have view access only. Generally, these individuals may be involved in step 2 of the submittal process. Users involved in data submittal should read the General Instructions in the next section and then skip to the section on data entry (pg 10).

Homepage & Site Features

The screenshot shows the ARL Statistics Survey Management Center homepage. The header includes the ARL Statistics logo and navigation links: ABOUT, ANALYTICS, NEWS, PUBLICATIONS, and EVENTS. A 'Survey Dashboard' section is highlighted with a red box labeled '3'. A left navigation bar is highlighted with a red box labeled '2'. A top right area with 'Welcome!', 'My Account', and 'Logout' links is highlighted with a red box labeled '1'. A 'Helpful hints' section at the bottom is highlighted with a red box labeled '4'.

1. Welcome! | My Account | Logout

2. Survey Management Center

- Home
 - About
 - News
 - Publications
 - Events
- Surveys
 - Salary Survey 2012-13 (Uni):
 - Health Science Library
 - Law Library
 - Main Library
 - Salary Survey 2012-13 (Non-Uni):
 - Main Library
- Management Center
 - Manage Surveys
 - Salary Survey 2012-13 (Uni)
 - Salary Survey 2012-13 (Non-Uni)
 - Manage Users
 - Manage Branches
 - Data Repository
 - Organization Websites
 - Directory
 - ARL Index

3. Survey Dashboard

Welcome to ARL Statistics!

To access a specific branch survey, please use the arrows in the dashboard below or the links in the left navigation bar under the 'Survey' heading. Please note that your specific edit rights (View or Edit) are indicated in the "My Rights" column.

Open Surveys

Salary Survey 2012-13 (Uni): Association of Research Libraries

Primary contact: [Shaneka Morris](#)

Branch	Status	My Rights	Go to Survey
Health Science Library	Open	Edit	↔
Law Library	Open	Edit	↔
Main Library	Review	Edit	↔
Second Law Library	Not Reporting		
Special Collections	Not Reporting		

Salary Survey 2012-13 (Non-Uni): Association of Research Libraries

Primary contact: [Shaneka Morris](#)

Branch	Status	My Rights	Go to Survey
Health Science Library	Not Reporting		
Law Library	Not Reporting		
Main Library	Open	Edit	↔
Second Law Library	Not Reporting		
Special Collections	Not Reporting		

4. Helpful hints:

This interface has been designed to simplify the data submission process and provide easy access to peer data. As you acquaint yourself with the site, please note the following features and resources:

Navigation – On the left side of this page is the navigation bar. Use the links in this bar to navigate between pages in the site. Please avoid using your browser's 'back' button.

'My Account' link – located in the top right corner of each page, this link takes you to a page where you can update your personal contact information.

'Logout' link – also located in the top right corner of each page, this link logs you out of the system. Be sure to do this when you leave the website to prevent the possibility of unauthorized access to your account.

Resources are available to assist you with gathering the needed data and reporting it using the Web interface at: <http://www.arl.org/stats/annualsurveys/arlstats/>

If you have questions, please contact Shaneka Morris (stats@arl.org) or Martha Kyriilidou (martha@arl.org). You can also reach us by phone at (202) 296-2296 or fax at (202) 872-0884.

(1) – Top right: This section of the page features links to pages where you can manage “My Account” and “Logout”.

(2) – Left Navigation Bar: Used to navigate throughout the site. The navigation bar is divided into three main sections:

- **Home** – Takes you to information about the ARL Statistics, Related Publications, and the Analytics products we offer.

- **Surveys** – contains sub-headers for each of the statistics publications under which there are links to data entry forms for each branch reporting data in that publication. If this section contains no links, your institution’s primary contact has not completed the survey set-up process and you should wait for further instructions or contact them directly.
- **Management Center** –This section lists links to survey set-up and management tools for each of your assigned surveys. This section also has links to summaries and survey forms from previous surveys (“Data Repository”) and the ARL Index.

(3) – **Survey Dashboard.** Highlights the data entry forms that need your attention (“My Rights” setting of ‘Edit’) and provides access to the form via the  icon. Forms with a “My Rights” setting of ‘View’ can also be accessed, but not edited. These rights are set by the primary contact at the time of survey set-up.

(4) – **Helpful Hints:** This section contains a few helpful tips on the features of the website as well as contact information for assistance with completing and submitting the survey.

Login

- Point your browser to www.arlstatistics.org and login.
- Enter your e-mail address and password.
- **If you have forgotten your password,** please click on the ‘Forgot your password?’ link. You will be prompted for your e-mail address. Enter it in the space provided and click ‘Submit’. If your email is in the database, you will receive a message at this address to reset your password. If the system returns the message “User does not exist” or if you do not receive an e-mail promptly, please contact the ARL Statistics and Assessment staff at 202-296-2296.

Instructions for Primary Contacts



Step 1: Review your Users and Your Survey Settings:

1) **Click Manage Users** - Review the users who have access to the ARL Statistics data entry system for your institution. Follow the directions at the top of the page to make any additions or changes.

2) Click the 2011-12 survey as shown below...



...and the following screen will appear. Click as shown in the red box below:

The screenshot shows the 'Manage Survey' page for 'Stage 2) Monitor Data Entry (ARL)'. The page includes a table with columns for Branch, Status, My Rights, and Go to Survey. Below the table, there is a 'Continue to Review' button and a red box highlighting the text 'Click here to review your survey settings.'

Branch	Status	My Rights	Go to Survey
Health Science Library	Open	Edit	➔
Law Library	Open	Edit	➔
Main Library	Open	Edit	➔
Second Law Library	Not Reporting		
Special Collections	Open	Edit	➔

If you agree with the settings shown, click the purple "Survey Management Center" box. [If you would like to change your survey settings, please email stats@arl.org.](#) Once you have approved your survey settings and/or contacted us to make changes and approved the subsequent changes, you will be ready to enter your data.

Step 2: Monitor and Complete Data Entry

Access your surveys by clicking as indicated below:

Complete all surveys. Click the  icon next to each question to access instructions regarding

the question.

For auto-calculated questions: [If you wish to manually enter a figure for a calculated question, select "Manual Override".](#) You will be able to enter a total for questions that are check "MO"; however, you will not be able to enter data for any of the sub-parts. For all other questions: [If the data for any question are unavailable, or if the question doesn't apply, leave it blank.](#) You will be

ARL Statistics 2011-12 - Association of Research Libraries: Main Library

You can edit this survey.

Please enter the data values for each question in the form below. **If you do not click on a "Save" button, any data you entered will not be saved and will not be available the next time you log onto your institution's survey.** When you have completed all the data for this branch, please click **Data Entry Complete** button after saving your data. You can access these forms as often as necessary, updating your data each time you visit.

Questions that have additional instructions may be accessed by clicking on the  icon next to the question. If you wish to manually enter a figure for a calculated question, check the box next to it. Note that while you will be able to enter a total for this question, you will not be able to enter data for any of the question's sub-parts.

If any data are unavailable, or if the question doesn't apply enter "0". You will be able to select NA/UA at Stage 3 for all questions that do not apply and/or for which data was not available. To enter a footnote for a particular question, select the footnote icon on the appropriate row. General footnotes are found at the very end of this form.

Key:

-  Click for information on a particular question or survey.
-  Add a new footnote to a question.
-  Edit an existing footnote.

Question	Response
Collections	
1) Titles held June 30 (current calendar year, all formats)	<input type="text"/>  
2) Volumes held June 30, 2012 (print plus electronic)	<input type="text"/>  
3) Basis of volume count.	<input type="text"/>  
4) Electronic books (included in question 2)	<input type="text"/>  
Expenditures	
5) Are expenditure figures reported in Canadian dollars?	<input type="text"/>  
6) Total library expenditures (exclude fringe benefits) (7.a + 8 + 9)	0 <input type="text"/>   <input checked="" type="checkbox"/> 
7) Total library materials (7.a + 7.b + 7.c)	0 <input type="text"/>  
a) One-time resource purchases	<input type="text"/>  

able to select NA/UA at Stage 3 for all questions that do not apply and/or for which data was not available.

Once all of your institution's surveys are completely filled out, click the 'Data Entry Complete' button at the bottom of EACH survey:

The screenshot displays the Survey Management Center interface for the ARL Statistics 2011-12 survey. The top navigation bar includes 'ABOUT', 'ANALYTICS', 'NEWS', 'PUBLICATIONS', and 'EVENTS'. The left sidebar contains a menu with categories like Home, Surveys, and Management Center. The main content area features the survey title 'ARL Statistics 2011-12 - Association of Research Libraries: Main Library' and instructions for data entry. A table with columns for 'Question', 'Response', and 'NA/UA' is visible. A blue box with arrows points to the bottom of the survey form, where a 'Data Entry Complete' button is highlighted with a red box and arrows.

Survey Management Center

ABOUT ANALYTICS NEWS PUBLICATIONS EVENTS

Home
About
News
Publications
Events

Surveys
Salary Survey 2012-13 (Uni):
Health Science Library
Law Library
Main Library
Salary Survey 2012-13 (Non-Uni):
Main Library

Management Center
Manage Surveys
Salary Survey 2012-13 (Uni)
Salary Survey 2012-13 (Non-Uni)
Manage Users
Manage Branches
Data Repository
Organization Websites
Directory

ARL Statistics 2011-12 - Association of Research Libraries: Main Library

You can edit this survey.

Please enter the data values for each question in the form below. If you do not click on a "Save" button, any data you entered will not be saved and will not be available the next time you log onto your institution's survey. When you have completed all the data for this branch, please click Ready for Review after saving your data. You can access these forms as often as necessary, updating your data each time you visit.

Questions that have additional instructions may be accessed by clicking on the "i" icon next to the question. To enter a footnote for a particular question, select the footnote icon on the appropriate row. General footnotes are found at the very end of this form.

Key:

- Click for information on a particular question or survey.
- Add a new footnote to a question.
- Edit an existing footnote.

Question	Response	NA/UA
Collections		

Scroll to the bottom of the survey...

General Footnotes

30) Report figures for fiscal year ending: (Please use MM/DD/YYYY format.)

31) Specify branch libraries included in the ARL Statistics:

32) Specify branch libraries **not** included in the ARL Statistics:

33) Specify additional general footnotes for the ARL Statistics:

Save

Data Entry Complete

Next, click the 'Continue to 'Review' button by clicking as indicated below:

Survey Management Center ABOUT ANALYTICS NEWS PUBLICATIONS EVENTS

Home
About
News
Publications
Events

Surveys
Salary Survey 2012-13 (Uni):
Health Science Library
Law Library
Main Library
Salary Survey 2012-13 (Non-Uni):
Main Library
ARL Statistics 2011-12:
Health Science Library
Law Library
Main Library
Special Collections

Management Center
Manage Surveys
Salary Survey 2012-13 (Uni)
Salary Survey 2012-13 (Non-Uni)
1. ARL Statistics 2011-12
Manage Users
Data Repository
Organization Websites
Directory
ARL Index

Manage Survey
Stage 2) Monitor Data Entry (ARL)
Use the grid below to monitor the status of data entry for your branches. All branches must show a status of "Review" to activate the "Continue for Review" button below, leading to **Step 3**. A branch's status will change from "Open" to "Review" after you click the "Ready for Review" button at the bottom of each survey form. Use the "Go to Survey" icons to access a branch's survey form.

Branch	Status	My Rights	Go to Survey
Health Science Library	Review	Edit	➔
Law Library	Review	Edit	➔
Main Library	Review	Edit	➔
Second Law Library	Not Reporting		
Special Collections	Review	Edit	➔

2. Continue to Review

Click [here](#) to review your survey settings.

If the "Continue to Review" button is gray, this means that one or more surveys is not in "Review" status, as shown above. Go to the survey(s) that are still marked as "Open", scroll to the bottom of each survey, and click "Data Entry Complete." Then click #1 above.

Step 3: Review and Submit your Data (Data Summaries)

After clicking "Continue to Review", you will be presented with a page that aggregates your data into each ARL publication. This page also allows you to compare your figures to last years' figures, as shown below:

Survey Management Center ABOUT ANALYTICS NEWS PUBLICATIONS EVENTS

Home
About
News
Publications
Events

Surveys
Salary Survey 2012-13 (Uni):
Health Science Library
Law Library
Main Library
Salary Survey 2012-13 (Non-Uni):
Main Library
ARL Statistics 2011-12:
Health Science Library
Law Library
Main Library
Special Collections

Management Center
Manage Surveys
Salary Survey 2012-13 (Uni)
Salary Survey 2012-13 (Non-Uni)
ARL Statistics 2011-12
Manage Users

Manage Survey
Stage 3) Review and Submit Data (ARL)
Below is a summary of the data entered in Step 2 aggregated by publication. For EACH tab, please do the following:

- Review your response for each question and compare with the previous year's total. In cases where there has been a significant percentage of change, be sure you have provided a footnote to justify the variation. If you find data that needs adjusting, visit the individual branch survey forms via the left navigation.
- For multiple choice questions, select the radio button of the choice you would like to display in the publication. If only one branch has been aggregated in the tab, this selection will be automatically made for you based on what you entered in the data form.
- At the end of each response row is a checkbox in a column marked NA/UA. Check this box **only** if you wish for the data displayed for this question to appear as 'NA' in the publication. Otherwise, leave the checkbox blank.

When you have completed your review of each tab, be sure to click the 'Update Inclusions' or 'Save' button at the bottom of the page to save your selections.

When you have finished reviewing each tab and are ready to submit your data to ARL, click the 'Submit' button at the bottom of this page.

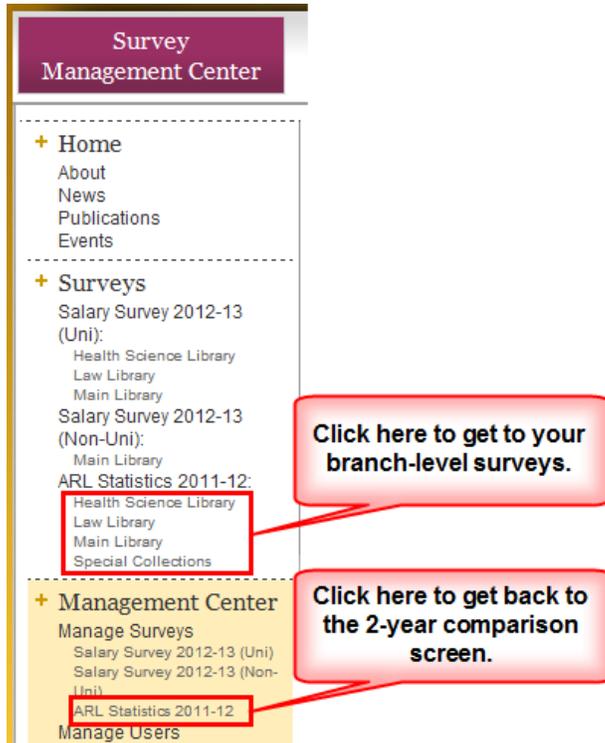
ARL Statistics Publication | Health Sciences Publication | Law Publication | Special Collections Publication | Footnotes

Question	Response			
	This Year's Data	Last Year's Data	% Changed	NA/UA
Collections				

For EACH tab, please do the following:

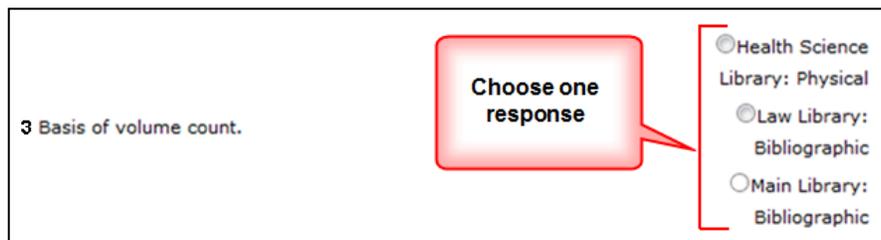
1) Review your response for each question and compare with the previous year's total. In cases where there has been a significant percentage of change, be sure you have provided a footnote to justify the variation. If you find data that needs adjusting, visit

the individual branch survey forms via the left navigation, as shown:



2) For the forced-choice questions, select the radio button of the choice you would like to display in the publication:

Example: Question #3 – Basis of Volume Count



If only one branch has been aggregated in the tab, this selection will be automatically made for you based on what you entered in the data form.

3) At the end of each response row is a checkbox in a column marked NA/UA. Check this box only if you wish for the data displayed for this question to appear as 'NA/UA' in the publication. Otherwise, leave the checkbox blank.

When you have completed your review of each tab, be sure to click the 'Update Inclusions' button at the bottom of the page to save your selections (#1 below). ***This must be done for each tab separately, i.e. law, health science and "main" report.***

When you have finished reviewing your data and are ready to submit your data to ARL, click the 'Submit' button at the bottom of the page (#2 below). Note that once you click this button, all data for this survey will be locked and can no longer be modified through the web interface. Carefully review your data prior to submission!

Survey Management Center

ABOUT ANALYTICS NEWS PUBLICATIONS EVENTS

Manage Survey
Stage 3) Review and Submit Data (ARL)
 Below is a summary of the data entered in Step 2 aggregated by publication. For EACH tab, please do the following:

1. Review your response for each question and compare with the previous year's total. In cases where there has been a significant percentage of change, be sure you have provided a footnote to justify the variation. If you find data that needs adjusting, visit the individual branch survey forms via the left navigation.
2. For multiple choice questions, select the radio button of the choice you would like to display in the publication. If only one branch has been aggregated in the tab, this selection will be automatically made for you based on what you entered in the data form.
3. At the end of each response row is a checkbox in a column marked NA/UA. Check this box **only** if you wish for the data displayed for this question to appear as 'NA' in the publication. Otherwise, leave the checkbox blank.

When you have completed your review of each tab, be sure to click the 'Update Inclusions' or 'Save' button at the bottom of the page to save your selections.

When you have finished reviewing each tab and are ready to submit your data to ARL, click the 'Submit' button at the bottom of this page.

ARL Statistics Publication | Health Sciences Publication | Law Publication | Special Collections Publication | Footnotes

Question	Response			
	This Year's Data	Last Year's Data	% Changed	NA/UA
Collections				

Scroll Down

1. Update Inclusions

Once you have reviewed each tab above and saved your selections, click the "Submit" button below to submit your data to ARL. Note that once you submit your data, all data for this survey will be locked and cannot be modified. **Carefully review your data prior to submission!**

Submit 2.

Once you see 'Step 4) Survey Complete' displayed at the top of the page, you have successfully submitted your data to ARL and the survey is now closed. No further edits can be made via the arlstatistics.org website, but you will still be able to view the branch forms and summaries if needed (via the left navigation). If you need to make corrections to your data after submittal, please contact the Statistics and Assessment staff at 202-296-2296 or stats@arl.org.

Instructions for Users (data entry personnel)

From the home page, links to survey forms for each reporting branch are available from the navigation bar on the left of your screen and from the Survey Dashboard. You may edit forms if designated with those rights by your institution's primary contact (your rights to a form will appear in red at the top). On each branch form, note the following features:

Survey Management Center

ABOUT ANALYTICS NEWS PUBLICATIONS EVENTS

ARL Statistics 2011-12 - Association of Research Libraries: Main Library

You can edit this survey.

Please enter the data values for each question in the form below. If you do not click on a "Save" button, any data you entered will not be saved and will not be available the next time you log onto your institution's survey. When you have completed all the data for this branch, please click **Data Entry Complete** button after saving your data. You can access these forms as often as necessary, updating your data each time you visit.

Questions that have additional instructions may be accessed by clicking on the icon next to the question. If you wish to manually enter a figure for a calculated question, check the box next to it. Note that while you will be able to enter a total for this question, you will not be able to enter data for any of the question's sub-parts.

If any data are unavailable, or if the question doesn't apply enter "0". You will be able to select NA/UA at Stage 3 for all questions that do not apply and/or for which data was not available. To enter a footnote for a particular question, select the icon on the appropriate row. General footnotes are found at the very end of this form.

Key:

- Click for information on a particular question or survey.
- Add a new footnote to a question.
- Edit an existing footnote.

Question	Response
Collections	
1) Titles held June 30 (current calendar year, all formats)	<input type="text"/>
2) Volumes held June 30, 2012 (print plus electronic)	<input type="text"/>
3) Basis of volume count.	<input type="text"/>
4) Electronic books (included in question 2)	<input type="text"/>
Expenditures	
5) Are expenditure figures reported in Canadian dollars?	Yes <input type="checkbox"/>
6) Total library expenditures (exclude fringe benefits) (7 + 8 + 9)	<input type="text"/>
7) Total library materials (7.a + 7.b + 7.c)	<input type="text"/>
a) One-time resource purchases	<input type="text"/>

(1) Calculated fields – These are identified by their darker color appearance as well as your inability to enter data. These fields are calculated based on entries in other boxes according to the formula indicated in parentheses. There is a "Manual Override" box next to each calculated field.

(2) - Definitions/instructions are provided for survey items. Simply click on the icon to open a new window containing the definitions/instructions for each item.

(3) Footnotes icon - Footnotes provide you with the opportunity to explain discrepancies in your data, document local practices that differ from the survey definitions, and add additional information about figures. Respondents are encouraged to be clear and concise. Click on the

footnotes icon  next to each item to enter additional details and information about your survey data. After you have entered a footnote, the icon will change in appearance to .

(4) Manual Override – If you have selected "Manual Override" for any question, you will be able to enter a total for that question; however, you will not be able to enter data for any of the sub-parts. If the data are unavailable, or if the question doesn't apply, leave it blank. Your Primary Contact will be able to select NA/UA at Stage 3 for all questions that do not apply and/or for which data was not available.

Other form features include:

- **'Save' button** - To save your entries, be sure to click the 'Save' buttons located throughout the form. Clicking a 'Save' button will save all entries in the form regardless of location. If you attempt to leave the page without saving your entries, a dialogue box will appear to remind you of this. Note any data you entered and did not save will NOT be available next time you login. A notice will appear on the top of the form in red to inform you that you saved data successfully.
- **'Data Entry Complete' button** –located at the bottom of each form, this button should **only** be clicked when **data entry** for a branch is **complete**. Clicking this button alerts your institution's primary contact that the data is ready for review. However, you are able to return to this form to edit data until its final submission to ARL by your institution's primary contact.
- **Entry area for general footnotes** – entry boxes for general footnotes can be found at the bottom of each survey form.

As you enter data, here are a few other key points to remember:

- **If you exit the Web form for any reason, remember to save your data!**
- Footnotes must be entered in the footnote box attached to each item. Do not attempt to place notes in the response fields.
- Explain any major increases or decreases from last year's data in footnotes. For the percent increases and decreases used to check for data accuracy in the ARL Statistics, see: <http://www.arl.org/bm~doc/arlstatpercent.xls>
- Document local practice that differs from the definitions found in the instructions by including a footnote.

Resources

All documents needed to complete the 2011-12 ARL Statistics survey are available on the ARL website at http://www.arlstatistics.org/About/Mailings/stats_2011-12. These documents include item definitions, data collection instructions, and helpful worksheets.

For assistance, please e-mail or Google chat: stats@arl.org
Tel. (202) 296-2296; FAX (202) 872-0884