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).
(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.

**Login**

- Point your browser to [www.arlstatistics.org](http://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:
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
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:
Next, click the 'Continue to 'Review' button by clicking as indicated below:

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:
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!

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:

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

3. **Footnotes icon (FAQ)** - 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 ![footnotes icon]

(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](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](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