Creating Reports
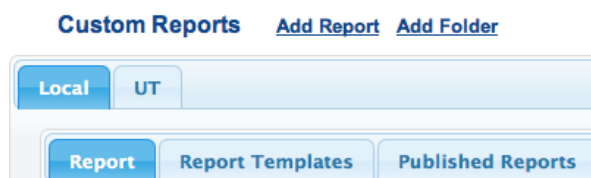
Counting Opinions™

...evidence-based management solutions

Reports

On the Reports page you will find at least two top-level tabs; Local, and Utah. Under the Local tab you will find at least three tabs; Reports, Report Templates, and Published Reports.

Locally created reports, ones that you and/or your library have created/ modified, are contained within the Local / Reports tab.

Report templates, shared with all users in your organization, are contained within the Report Templates tab. Use these to create your own custom Report based on the settings defined in the Template.

The Published Reports tab contains URL(s) to Report(s) previously published. Each Published Report has a unique URL that is a "perma-link" to the report outputs that are easily shared with others. Access to published reports does not require a secure login, enabling you to easily share your results (the URL) with a wider audience, e.g., via email or posting on a Web site.

The green navigation bar includes links to Library Trend and Ranking Reports.

Library Trend

- Trend reports highlight the longitudinal results for the selected data and periods. The Library Trend report shows a summary of the data for the selected periods and includes a percentage difference (gap) between results in consecutive periods.

Ranking Report

- Ranking Reports summarize the results for your organization and/or location versus other organizations/locations. The Ranking Report includes Minimum, Maximum, and Average values for all reporting institutions/locations for ease of comparing your results.

Managing Reports

The Report Management Screen is an on-line filing cabinet with folder tabs for organizing reports. By default, you have access to the folders as shown above. With sufficient permissions, Reports can be created using the "Add Report" link or by selecting an existing Report (or Report Template) and then saving as a New Report.

Creating a New Report

To create a new report, click on the "Add Report" link. This opens the "Report Settings" screen where you can define the Collections (i.e., survey results), Periods (i.e., data sets), Performance Indicators (PIs), and other settings for each report.
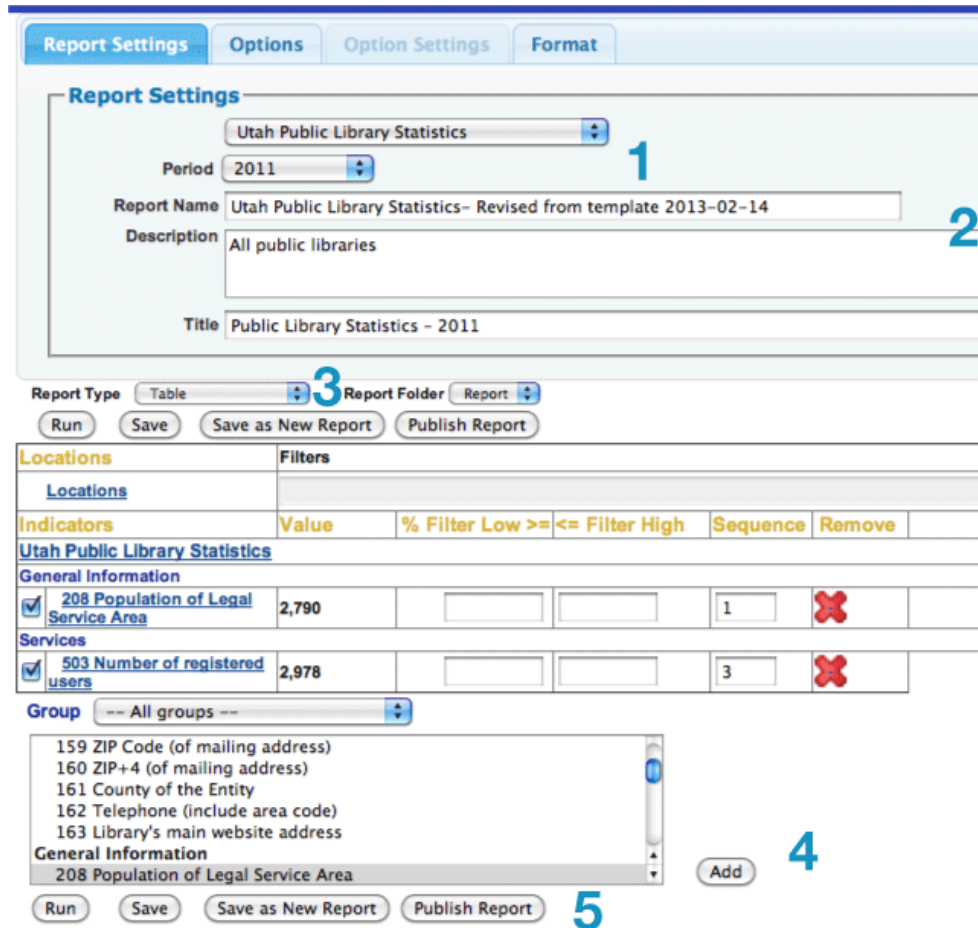
1. Select the Collection and the Period(s) from the dropdown menu.

2. Name and Describe your report.

3. Select the Report Type. Save as a New Report to create a new instance of the report to modify and run.

4. Select the Performance Indicators to include in the report and then Add them.

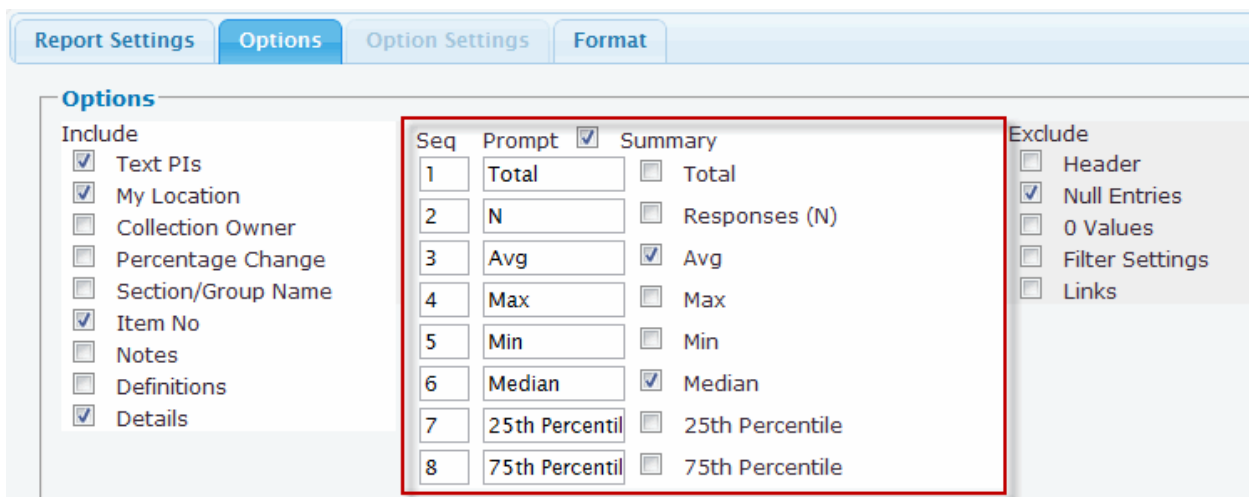5. Save, Run, and optionally Publish your report.

Create a new report by selecting a Collection from the list of available list of Collections, e.g. Utah Public Library Statistics. Once a Collection is selected the screen will refresh with the list of available PIs for that Collection.

To expedite the selection of specific PIs to include in the Report, you can specify a Group/Section name from the available list. Select one or more PIs (click the PI name to highlight) then click "Add". You can also multi-select PIs by holding down the control key (or command key for Apple users) when selecting PIs.

You can also add PIs from more than one Collection. To do so, simply select a different Collection from the available list and then Add additional PIs as appropriate.
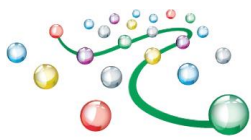
Report Options

The Options tab reveals the various settings that are available (see below)

The various report Options enable settings for what should be included/excluded from the results. Use the Option settings to include/exclude details, summary data (e.g., Mean, Median, Maximum, Minimum, Total, and Number of Respondents), Notes, Definitions, Null Entries, 0 Values, and more.

Results Filtering

Any PI added to a Report can be used for filtering results. Percentages (%), Minimum, and/or Maximum values can be defined. Filter settings ensure that only those locations matching the defined filter criteria are included in the results. The "% Filter Low >=" field can also be used to set a percentage range filter. By setting the Filter Low value to 15% for example, the system filters results based on locations within +/- 10% of the data values for your location. You can also filter text results (e.g., Library name, City, etc.). Click your cursor while hovering over the associated filter field to get to a pop-up window enabling you to select the values matching your filter criteria. Remember to click Update when you are done.

Locations Filter

Selecting the Locations Filter triggers a pop-up window with all locations. Location filters can be saved and reused across your collections.

Report Types

LibPAS features many different Report Types, providing you with different views of the results. Most tabular report types feature graph icons linked to pop-up graphs for the selected results and downloadable Excel files enabling you to explore the results off-line.

Table Report

Utah Public Library Statistics

Survey: **Utah Public Library Statistics**   Period: **2011, Start 2010-07**   Months: **12**

Locations (16)	208 Population of Legal Service Area	550 Total Circulation	503 Number of registered users	600 Total Number of Library Programs
Beaver Public Library	3,112	17,189	1,665	98
Delta City Library	3,436	38,218	3,282	61
Garland Public Library	2,400	35,286	912	77
Helper City Library	2,201	12,150	1,295	73
Juab County Bookmobile Library	4,869	32,922	1,547	0
Kanab City Library	4,312	55,711	3,510	34
Kane County Bookmobile Library	2,844	15,685	1,045	4
Manti City Library	3,276	29,067	1,552	94
Monroe Public Library	2,256	11,643	1,239	38
Mount Pleasant Public Library	3,260	81,224	2,193	175
Total	50,418	508,771	28,766	880
Avg	3,151	31,798	1,798	55

Table Reports provide a view of the data by location for a selected period. The report features interactive column sorting, pagination options, graph icons (to pop-up charts/graphs) and an Excel download link. Results for your location are highlighted (displayed using a different color) in the tabular and graph outputs, for ease of comparison.

Option settings include: summary data (Average, Median, Maximum, Minimum, Total, and Number of Respondents), notes, group names, definitions, etc.; or the exclusion of: Null Entries, 0 Values, Header, etc.

Tips

- Display more libraries: Increase the number of displayed rows at the bottom of the report.

- Sorting: Click on the arrow at the top of any column to sort libraries.

- 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 toward bottom right of
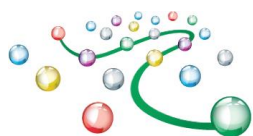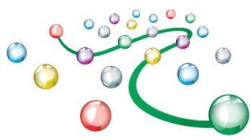
PI Report

PI Reports summarize the results 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) (see the example below). Use the Options tab to change the Summary settings, including the sequence and prompts used, as required.

	550 Total Circulation	
1	Rich County Bookmobile Library	3,864
2	Monroe Public Library	11,643
3	Helper City Library	12,150
4	Kane County Bookmobile Library	15,685
5	Beaver Public Library	17,189
6	Wayne County Bookmobile Library	18,320
7	Salina Public Library	27,938
8	Manti City Library	29,067
9	Juab County Bookmobile Library	32,922
10	Parowan Public Library	34,925
11	Garland Public Library	35,286
12	Delta City Library	38,218
13	President Millard Fillmore Library	42,460
14	Richmond Public Library	52,169
15	Kanab City Library	55,711
16	Mount Pleasant Public Library	81,224
	Total	508,771
	Avg	31,798
	Max	81,224
	Min	3,864
	Median	30,995
	Lower Quartile - 25%	38,218
	Upper Quartile - 75%	17,189
	Variance - 25% above average	39,748
	Variance - 25% below average	23,849
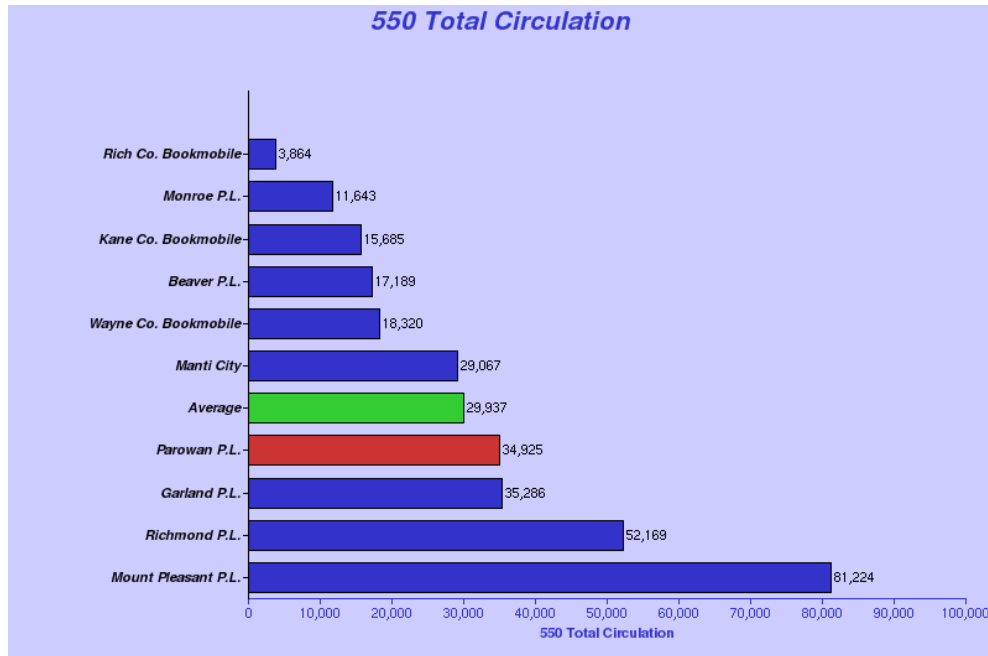
Graph/PI

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 "cross-tabulation" can help to convey 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.
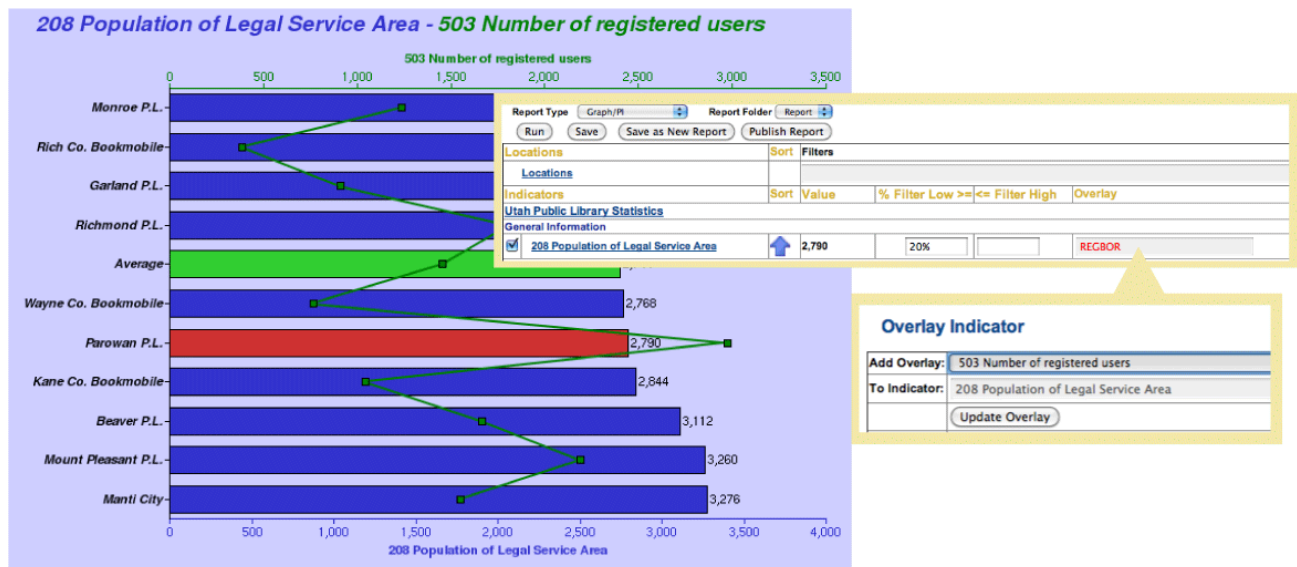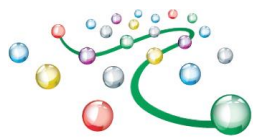
Summary Report
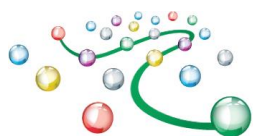
Survey: Utah Public Library Statistics		Period	2011		
Name	**Total**	**Avg**	**Max**	**Min**	**Median**
208 Population of Legal Service Area	27,441	2,744	3,276	2,256	2,779
550 Total Circulation	299,372	29,937	81,224	3,864	23,694
503 Number of registered users	14,549	1,455	2,978	388	1,396
600 Total Number of Library Programs	640	64	175	4	59

Summary reports display a summary of all selected locations for the chosen PIs and period. Data is shown for the PI Total, Minimum, Maximum, Average, and Median.

Summary Graphs

Summary Graph reports present an overall picture of the selected PI(s) for a given period. There is a marker for Minimum, Maximum, and Median values. The red marker in the middle represents where 50% of the results fall. See below.

600 Total Number of Library Programs									
Total	640	Avg	64	Max	175	Min	4	Median	98
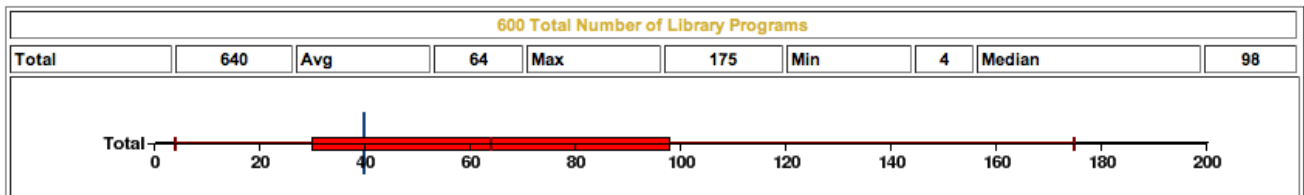
Trend/PI

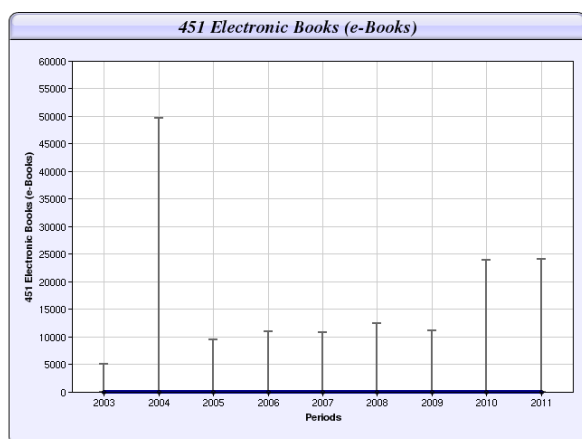| 450 Print Materials	2003	2004	2005	2006	2007	2008	2009	2010	2011
Beaver Public Library	17,369	17,872	18,368	19,241	17,661	18,775	18,807	19,688	15,634
Garland Public Library	10,463	10,485	11,086	11,107	11,598	12,825	13,689	13,742	13,287
Kane County Bookmobile Library	35,941	38,150	40,451	36,776	33,360	31,050	27,578	25,860	23,721
Mount Pleasant Public Library	22,990	22,826	23,459	24,267	25,215	26,152	26,713	26,531	26,206
Parowan Public Library	31,574	33,754	36,984	36,484	34,892	35,027	37,920	26,492	18,996
Richmond Public Library	17,997	18,578	18,888	18,823	19,665	20,377	20,783	21,072	21,888
Wayne County Bookmobile Library	21,449	22,426	22,437	22,633	22,173	22,756	22,193	23,110	22,330
Total	157,783	164,091	171,673	169,331	164,564	166,962	167,683	156,495	142,062

The Trend/PI report displays the data for the chosen PIs over the selected periods. This report also features a click only graph of the data.
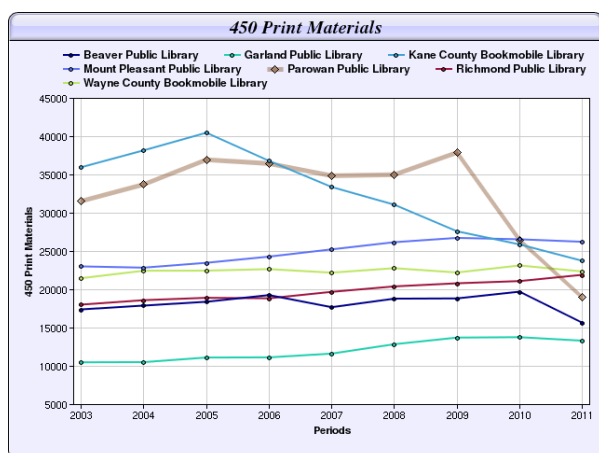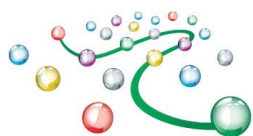

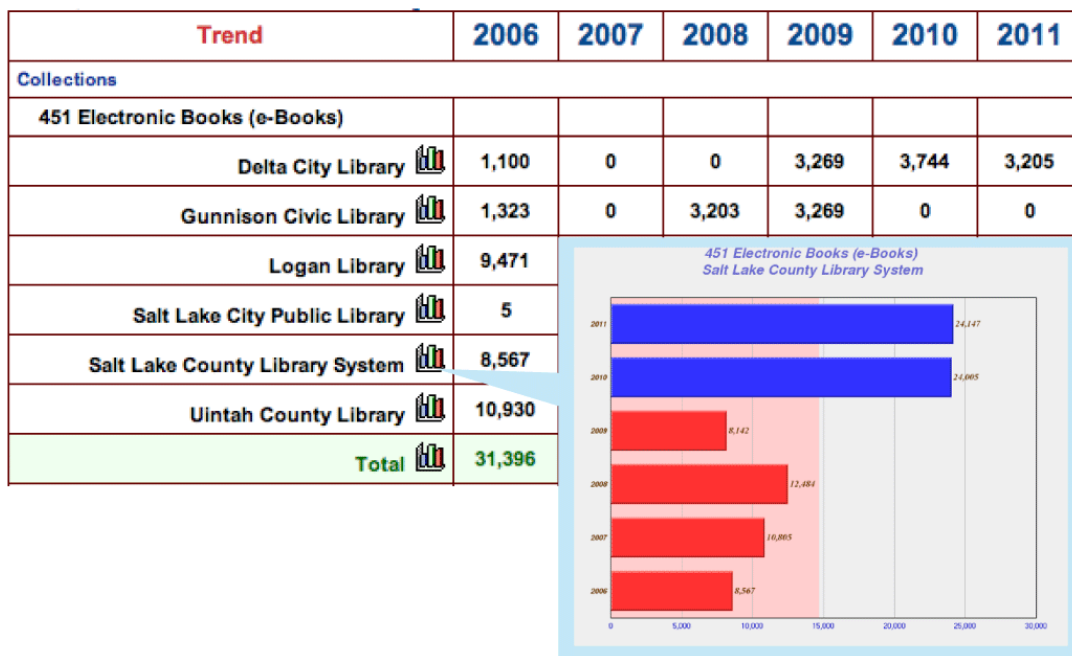1–9 Locations the pop-up appears as a line graph.

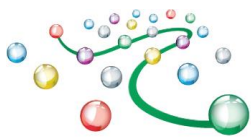10+ Locations the pop-up appears as a distribution graph

Trend Reports

Trend	2006	2007	2008	2009	2010	2011
Collections						
451 Electronic Books (e-Books)						
Delta City Library	1,100	0	0	3,269	3,744	3,205
Gunnison Civic Library	1,323	0	3,203	3,269	0	0
Logan Library	9,471					
Salt Lake City Public Library	5					
Salt Lake County Library System	8,567					
Uintah County Library	10,930					
Total	31,396					

451 Electronic Books (e-Books)
Salt Lake County Library System

Trend reports enable comparison of results over multiple periods. The reports feature pop-up graphs (graph icon), as per the example shown below. You can include as many time periods as are available. Trend reports support various Options including: details and summary data such as the Number of Respondents (N), the Average (mean), Minimum, Maximum, Median, and Total values. In the example Trend graph (below) the pale red shading in the background represents the average. Above average results are shown by the blue bars, while below average results are shown in red.

Tips

Include "Details" to display the Trend Report with location details, as shown above. Use Filters before running this report to narrow the results.

Report Settings | **Options** | O

Options

Include
- ☐ Text Pls
- ☐ My Location
- ☐ Collection Owner
- ☑ Percentage Change
- ☐ Section/Group Name
- ☐ Item No
- ☐ Notes
- ☐ Definitions
- ☑ Details

Trend	2009	Diff(%)	2010	Diff(%)	2011
Collections					
454 Video Materials - Physical Units					
Beaver Public Library	632	3.16%	652	64.11%	1,070
Kane County Bookmobile Library	0	0%	342	-3.51%	330
Mount Pleasant Public Library	2,408	-0.5%	2,396	-20.03%	1,916
Parowan Public Library	225	-56.89%	97	-76.29%	23
Richmond Public Library	1,609	0.62%	1,619	3.71%	1,679
Wayne County Bookmobile Library	594	46.13%	868	33.06%	1,155
Total	5,468	9.25%	5,974	3.33%	6,173

The Trend report supports various report options. Select the Options Tab to customize trend reports.

Trend	2003	2004	2005	2006	2007	2008	2009	2010	2011
Collections									
455.2 Total Library Collection									
Total	580,966	621,576	651,647	658,517	656,672	644,776	635,770	615,951	604,299
Avg	23,239	24,863	26,066	26,341	26,267	26,866	26,490	25,665	25,179
Max	60,342	62,040	62,302	63,429	59,116	55,434	53,574	52,934	51,466
Min	10,231	10,494	10,577	10,922	11,113	10,878	10,758	10,991	10,672
Median	22,505	23,489	24,506	24,916	25,831	26,075	24,543	25,438	24,370

The Trend Report can display the results without any Details. You can choose to add a filter to this report or run the report without a filter to show the results for all respondents. This is a summary Trend Report.
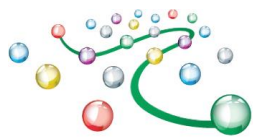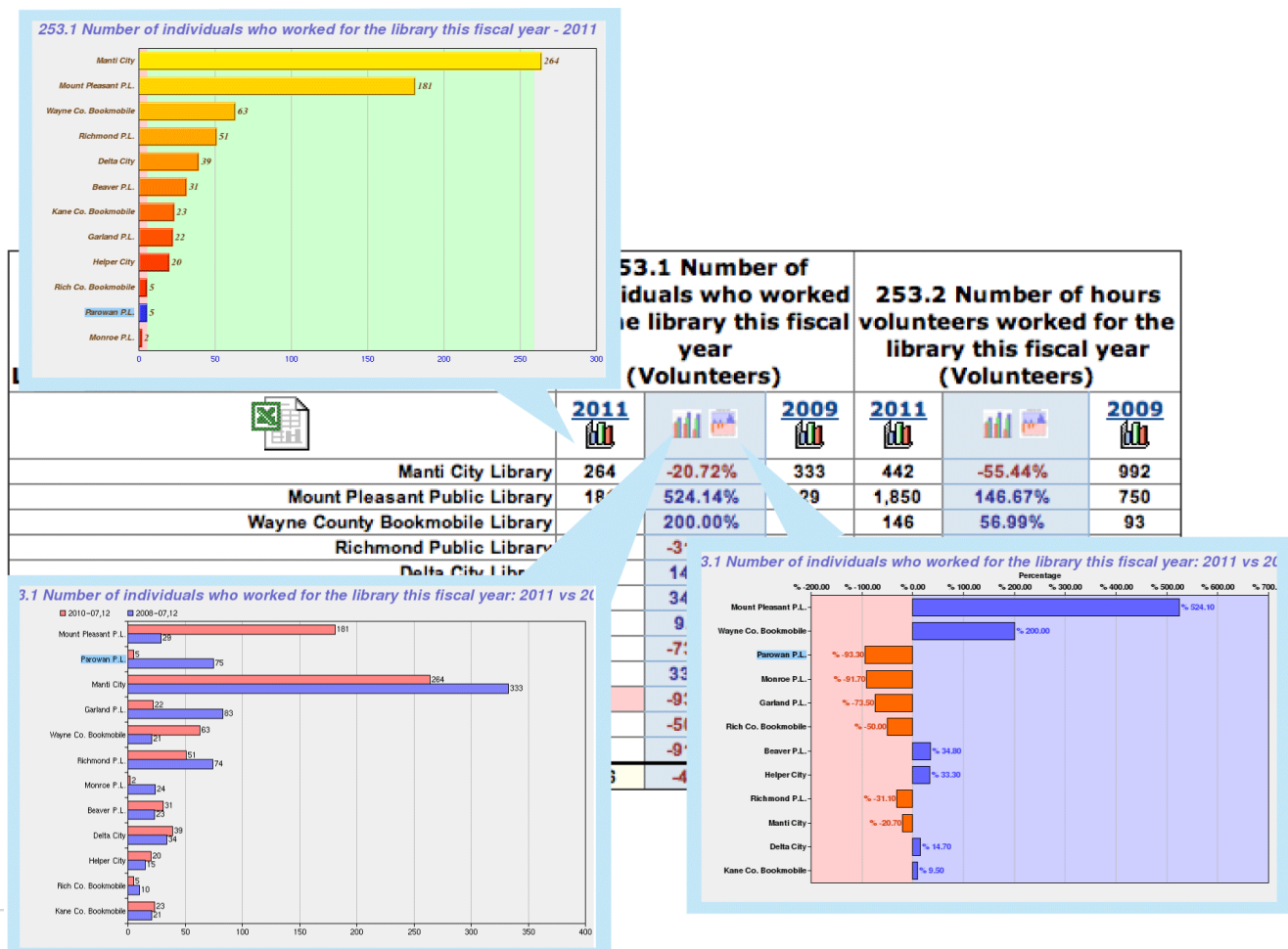
Period Comparison

Locations – 12	253.1 Number of individuals who worked for the library this fiscal year (Volunteers)			253.2 Number of hours volunteers worked for the library this fiscal year (Volunteers)		
	2011		**2009**	**2011**		**2009**
Manti City Library	264	-20.72%	333	442	-55.44%	992
Mount Pleasant Public Library	181	524.14%	29	1,850	146.67%	750
Wayne County Bookmobile Library	63	200.00%	21	146	56.99%	93
Richmond Public Library	51	-31.08%	74	411	16.10%	354
Delta City Library	39	14.71%	34	67	-4.29%	70
Beaver Public Library	31	34.78%	23	700	255.33%	197
Kane County Bookmobile Library	23	9.52%	21	35	2.94%	34
Garland Public Library	22	-73.49%	83	1,635	228.97%	497
Helper City Library	20	33.33%	15	1,598	2,119.44%	72
Parowan Public Library	5	-93.33%	75	35	-89.71%	340
Rich County Bookmobile Library	5	-50.00%	10	45	-63.41%	123
Monroe Public Library	2	-91.67%	24	16	-92.86%	224
total	706	-4.85%	742	6,980	86.33%	3,746

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.
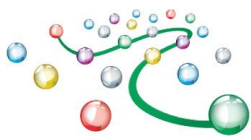
PI Gap

The PI Gap Report is useful in comparing two data elements. The paired ordering of PIs in the report output is determined by their Sequence value in the Report settings screen. The PI Gap Report features downloadable Excel results, and click-only icons to pop-up graphs.

Locations – 10		251 Total FTE of Librarians vs 253 Total FTE of Paid Staff			550 Total Circulation vs 551 Circulation of Children's Materials		
Manti City Library		3.00	-9.1%	3.30	29,067	57%	18,509
Beaver Public Library		2.20	-5.2%	2.32	17,189	81%	9,497
Mount Pleasant Public Library		1.00	-57.4%	2.35	81,224	96.5%	41,328
Parowan Public Library		1.00	-44.4%	1.80	34,925	241%	10,243
Monroe Public Library		0.75	-50%	1.50	11,643	235%	3,476
Richmond Public Library		0.75	-57.1%	1.75	52,169	68.8%	30,906
Garland Public Library		0.65	-49.2%	1.28	35,286	44.5%	24,423
Wayne County Bookmobile Library		0.56	-27.3%	0.77	18,320		
Kane County Bookmobile Library		0.35	-42.6%	0.61	15,685	53.7%	10,202
Rich County Bookmobile Library		0.10	-83.3%	0.60	3,864		
Total		10.36	-36.36%	16.28	299,372	101.48%	148,584

Cross Tab

208 Population Of Legal Service Area

550 Total Circulation	0-5,000	5,001-20,000	20,001-50,000	50,001-100,000	100,000+	Row Total
0–20000	9 / 90 / 47.4	1 / 10 / 4.8	0 / 0 / 0	0 / 0 / 0	0 / 0 / 0	10 / 16.1
20001-40000	9 / 75 / 47.4	3 / 25 / 14.3	0 / 0 / 0	0 / 0 / 0	0 / 0 / 0	12 / 19.4
40001-60000	0 / 0 / 0	0 / 0 / 0	0 / 0 / 0	0 / 0 / 0	0 / 0 / 0	0 / 0
60001-80000	0 / 0 / 0	4 / 80 / 19	0 / 0 / 0	1 / 20 / 50	0 / 0 / 0	5 / 8.1
80001+	1 / 2.9 / 5.3	13 / 37.1 / 61.9	14 / 40 / 100	1 / 2.9 / 50	6 / 17.1 / 100	35 / 56.5
Column Total	19 / 30.6	21 / 33.9	14 / 22.6	2 / 3.2	6 / 9.7	62 / 100

Note:First values in each table cell are actual location counts.
Blue numbers in each cell are percentages(%) of row values in that cell.
Green numbers in each cell are percentages(%) of column values in that cell.
Links enable drill-down to specific details for selected entries.

A Cross Tab 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 Report.

To Create a Cross Tab Report

1. Create a report, set the Report Type to Cross Tab.

2. Setup Group breakouts for the Cross Tab Report – click on the Group link to set the groups you would like to use to breakout the data.

3. The Load Options feature can be used to update the Section/Group names and values or copy-and-paste to reuse the list in other PI (performance indicator) Groupings.

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 handy for auto-creation of standard Monthly, Quarterly, and Annual reports that typically include several Custom Reports throughout the Document.

Utah Public Libraries

	150 FSCS ID	151 Library Code	153 Street Address	154 City (of street address)	155 ZIP Code (of street address)	208 Population of Legal Service Area
Davis County Library	UT0019	DAVSCO1100	38 SOUTH 100 EAST	FARMINGTON	84025	307,856
Orem Public Library	UT0059	UTAHCO1400	58 NORTH STATE STREET	OREM	84057	88,328
Provo City Library	UT0062	UTAHCO1700	550 NORTH UNIVERSITY AVENUE	PROVO	84601	112,488
Salt Lake City Public Library	UT0048	SLTLAK1200	210 EAST 400 SOUTH	SALT LAKE CITY	84111	186,440
Salt Lake County Library System	UT0049	SLTLAK1300	2197 EAST FORT UNION BLVD.	SALT LAKE CITY	84121	800,724
Utah County Bookmobile Library	UT0056	UTAHCO1100	125 WEST 400 NORTH	MAPLETON	84664	92,637
Washington County Library	UT0066	WASHCO1100	88 WEST 100 SOUTH	ST. GEORGE	84770	138,451
Weber County Library System	UT0069	WEBRCO1100	2464 JEFFERSON AVENUE	OGDEN	84401	232,228
Utah State Library Division						
Total	**0**	**0**	**0**	**0**	**0**	**1,959,152**

Table Report - Utah Public Libraries
FILE=http://ut.countingopinions.com/pireports/report.php?rkey=c734324f563d3eafe14b7f0e6c356397&rid=20374

FILE=http://ut.countingopinions.com/pireports/tblreports/14805/rperiod.html

The URL at the bottom of the report can be embedded into an offline document. This enables the results from this report (and others) to be populated directly into a standard document template (e.g. Word, Excel, etc.)

Published Reports

All reports can be published and shared with others by sending via email, text message, twitter or posting on a Web site 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)