



# **State Library Administrative Agency Survey, FY 2020 Web-Based Data Collection Tool User's Guide**

**Institute of Museum and Library Services**

The Institute of Museum and Library Services is authorized under 20 U.S.C. Chapter 72 to fulfill the congressional mandate to carry out analyses of the impact of library services.

## Table of Contents

1	INTRODUCTION .....	1
2	LOGGING IN .....	1
3	NAVIGATION .....	2
3.1	DASHBOARD .....	2
3.2	GO TO BUTTON.....	2
3.3	SAVE & NEXT AND SAVE & PREVIOUS BUTTONS .....	3
3.4	STATUS INDICATOR FOR EACH SECTION .....	4
4	PRINTING .....	4
5	DATA ENTRY .....	5
6	EDIT REVIEW AND RESOLUTION .....	6
7	DATA SUBMISSION.....	8
8	STATE LIBRARIAN CERTIFICATION .....	9
9	POST-EDIT SURVEY FOLLOW-UP.....	9
10	CHANGES FROM THE PRIOR SURVEY .....	9
10.1	HELP SECTION .....	9
11	LOGOUT .....	9

## Table of Figures

FIGURE 1.	THE “FORGOT PASSWORD?” LINK ON THE LOGIN SCREEN. ....	1
FIGURE 2.	THE TOP PORTION OF THE DASHBOARD OR HOME SCREEN FOR THE SURVEY .....	2
FIGURE 3.	THE <b>GO TO</b> BUTTON AT THE BOTTOM OF A SURVEY SECTION .....	3
FIGURE 4.	THE <b>SAVE &amp; PREVIOUS</b> AND <b>SAVE &amp; NEXT</b> BUTTONS FOR A SURVEY SECTION..	3
FIGURE 5.	SURVEY SECTIONS WITH THE STATUS FOR EACH PART OF THE SURVEY .....	4
FIGURE 6.	THE REPORTS SCREEN.....	5
FIGURE 7.	SECTION LINKS ON THE EDIT REPORT SCREEN .....	7
FIGURE 8.	THE SAVE JUSTIFICATION BUTTON .....	8

# 1 Introduction

This user's guide provides information needed to complete the FY 2020 State Library Administrative Agency (SLAA) Survey. There are six steps you must complete to submit your data: log-in, data entry, edit review and resolution, data submission, State Librarian certification, and post-edit survey follow-up (if needed).

If you encounter any problems with the system, please contact the survey administrators at RTI International (RTI) at [SLAA@rti.org](mailto:SLAA@rti.org) or 1-866-509-7472. The Help Desk is open from 9 a.m. to 5 p.m. ET Monday through Friday. Respondents who require assistance outside of these hours may schedule an appointment with the Help Desk.

# 2 Logging In

Key holders will receive a user ID and temporary password in a separate document.

You must change your password when you log in to the system for the first time. If you forget your password when accessing the survey in the future, click the **Forgot Password** link to gain access to the survey.

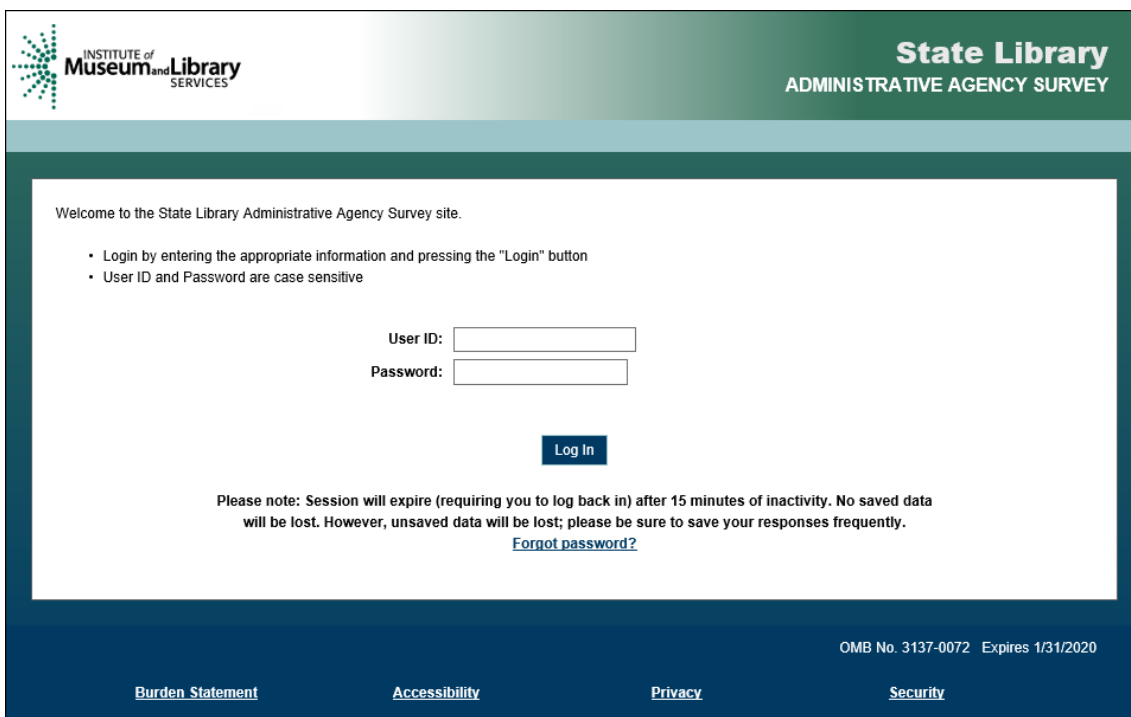


Figure 1. The “Forgot password?” link on the login screen.

After reaching the website through your browser, type in your user name and password, then click **Log In**. After your credentials are authenticated, you will be taken to the **Home Screen**.

After a successful login, click **Start** in the **Action** column to begin a part of the survey.

### 3 Navigation

Each page of the survey has a top navigation bar with four tabs: **Dashboard**, **Reports**, **Help**, and **Logout**.

#### 3.1 Dashboard

The dashboard is the home screen for the survey. Click the **Start/Continue** link for each section in the **Action** column to go to that part of the survey. The dashboard also displays the status of each part of the survey.

Action	Part	Part Status	Accepted
<a href="#">Start</a>	Part A: State Library Administrative Agency Identification	Not started	No
<a href="#">Start</a>	Part B: Governance	Not started	No
<a href="#">Start</a>	Part C: Allied Operations	Not started	No
<a href="#">Start</a>	Part D: Services to Libraries	Not started	No
<a href="#">Start</a>	Part E: Public Service	Not started	No
<a href="#">Start</a>	Part F: Collections	Not started	No
<a href="#">Start</a>	Part G: Library Service Transactions	Not started	No
<a href="#">Start</a>	Part H: Library Development Transactions	Not started	No
<a href="#">Start</a>	Part I: Staff	Not started	No
<a href="#">Start</a>	Part J: Revenue	Not started	No
<a href="#">Start</a>	Part K: Expenditures	Not started	No
<a href="#">Start</a>	Part L: LSTA State Program Expenditures	Not started	No
<a href="#">Start</a>	Part M: Electronic Services and Information	Not started	No

After you have completed the survey and all the survey data is clean and accepted, the **Submit Data** button will become enabled and clickable. Then click on the **Submit Data** button to submit the survey. After the survey is submitted, it will still be viewable and printable. However, additional changes to the survey will not be possible unless you submit a request to the [SLAA Help Desk](#).

**Submit Data**

Figure 2. The top portion of the dashboard or home screen for the survey

#### 3.2 Go To Button

The **Go To** button appears at the bottom of each survey section. Select a section in the drop-down menu and then click the **Go To** button to jump to that part of the survey. Clicking the **Go To** button also will save the survey data entered on the current page.

**Survey Respondent:**

A-180 Name:  A-190 Title:

A-200 Telephone:  -  -  Ext.

A-210 Fax:  -  -

A-220 Email address:

**Reporting Period:**  
Report data for State fiscal year 2017-2018 (except parts B&I)

A-230 Fiscal Year starting date (mm/dd/yyyy):

A-240 Fiscal Year ending date (mm/dd/yyyy):

Please click [here](#) if you would like to refer to useful files (including Survey Instructions and the User's Guide) in the [Ready Reference Shelf](#).

Icon Description: Fatal error - must fix Confirm or explain Edit reason

[Verify & Save](#) [Edit Report](#) [Save & Next](#)

A: Identification (A-010 - A-240)

OMB No. 3137-0072 Expires 1/31/2020

[Burden Statement](#) [Accessibility](#) [Privacy](#) [Security](#)

Figure 3. The *Go To* button at the bottom of a survey section

### 3.3 Save & Next and Save & Previous Buttons

The **Save & Next** and **Save & Previous** buttons appear at the bottom of each survey section except for Section A, which does not have a preceding section. Use these buttons to save the data on the current page and to move the next page or return to the previous page.

A. Independent agency (i.e. not part of a cabinet-level agency) - Specify to whom the agency reports:

B-020  Governor  
 Board/Commission—Specify selection method:

B-030  Appointed by Governor  
B-040  Appointed by other official

B. Part of a larger agency - Specify:

B-050  Department of Education  
 Department of Culture Resources  
 Department of State  
 Other agency - Specify: B-060

If you specified B-050 above, does your SLAA have a board or commission?

B-070  Yes - specify the board/commission selection method:  
B-080  Appointed by Governor  
B-090  Appointed by other official  
 No

Please click [here](#) if you would like to refer to useful files (including Survey Instructions and the User's Guide) in the [Ready Reference Shelf](#).

Icon Description: Fatal error - must fix Confirm or explain Edit reason

[Verify & Save](#) [Edit Report](#) [Save & Previous](#) [Save & Next](#)

B: Governance (B-010 - B-090)

OMB No. 3137-0072 Expires 1/31/2020

[Burden Statement](#) [Accessibility](#) [Privacy](#) [Security](#)

Figure 4. The *Save & Previous* and *Save & Next* buttons for a survey section

### 3.4 Status Indicator for Each Section

The SLAA survey has 13 sections, A-M. The status of each section of the survey is recorded in the Part Status column on the Dashboard. There are four possible statuses:

- **Not Started:** The user has not entered data for that part.
- **Errors Exist:** The user has entered data, but errors exist.
- **Incomplete:** The user has entered data and no errors exist, but the section is not complete.
- **Clean:** Data have been entered and no questionable data exist.

The status of each part is continually updated, so you will be able to identify which parts need additional information.

The screenshot shows the dashboard for the State Library Administrative Agency Survey. At the top left is the logo for the Institute of Museum and Library Services. The top right features the text 'State Library ADMINISTRATIVE AGENCY SURVEY'. Below this is a navigation bar with 'DASHBOARD', 'REPORTS', 'HELP', and 'LOGOUT'. A 'Welcome' message and a 'Help Desk' button are also visible. The main content area contains a table titled 'Survey Sections' with the following data:

Action	Part	Part Status	Accepted
<a href="#">Continue</a>	Part A: State Library Administrative Agency Identification	Incomplete	No
<a href="#">Continue</a>	Part B: Governance	Clean	Yes
<a href="#">Continue</a>	Part C: Allied Operations	Clean	Yes
<a href="#">Continue</a>	Part D: Services to Libraries	Incomplete	No
<a href="#">Start</a>	Part E: Public Service	Not started	No
<a href="#">Start</a>	Part F: Collections	Not started	No
<a href="#">Start</a>	Part G: Library Service Transactions	Not started	No
<a href="#">Start</a>	Part H: Library Development Transactions	Not started	No
<a href="#">Start</a>	Part I: Staff	Not started	No
<a href="#">Start</a>	Part J: Revenue	Not started	No
<a href="#">Start</a>	Part K: Expenditures	Not started	No
<a href="#">Continue</a>	Part L: LSTA State Program Expenditures	Incomplete	No
<a href="#">Start</a>	Part M: Electronic Services and Information	Not started	No

Figure 5. Survey Sections with the status for each part of the survey

## 4 Printing

Use your browser's **Print** button or the **Print** option under the **File** menu to print the survey data directly from the data entry screens.

A blank version of the survey data entry form may be viewed and printed using the **Survey Form (Blank)** option found on the **Reports** menu. You also can view and print forms that include any current-year data that has been entered via the **Survey Form (Current Year Data)** found on the **Reports** menu.

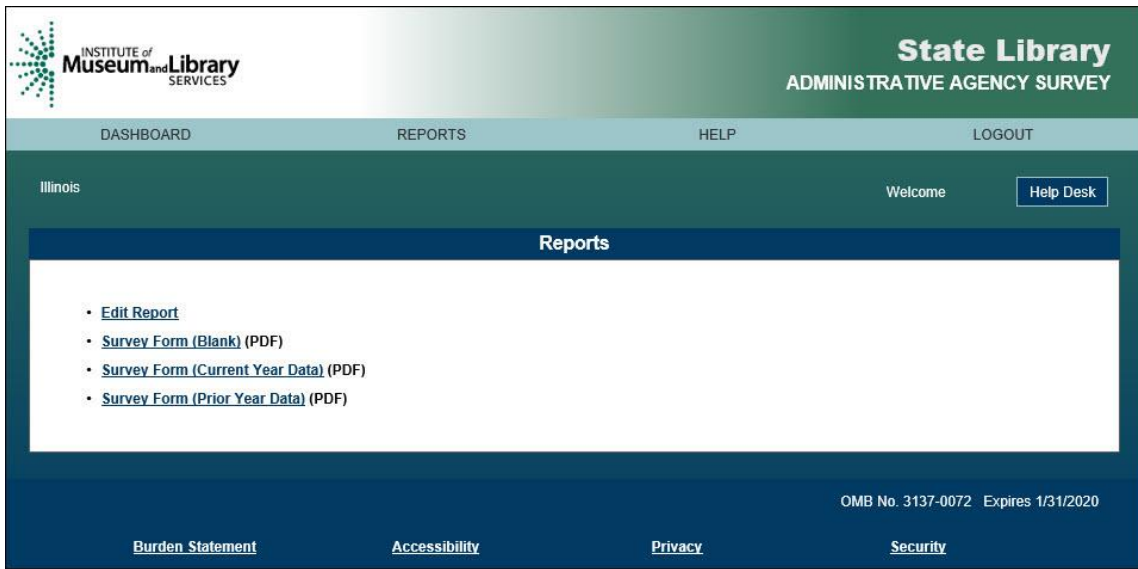


Figure 6. The Reports screen

Similarly, you can view and print forms that include prior-year data via the **Survey Form (Prior Year Data)** option.

After clicking any these options, a **File Download** dialogue box will open, and you will be able to open or save the PDF. Once opened, the document can be printed.

Use your browser's **Back** button to return to the previously viewed screen.

## 5 Data Entry

Users should complete the survey sequentially from Part A to Part M. Edits in the later parts may be affected by entries at the beginning of the survey.

Please note the following instructions:

1. **Identification verification. Part A. (SLAA Identification)** Identification may be prefilled with data provided by your agency. *If so, please verify this information and correct or update anything that has changed.*
2. **Saving/viewing data.** You must save your data before exiting each part of the survey.
  - The **Verify & Save** button will save the data and stay on the current screen.
  - The **Save & Next** button will save the data and move to the next screen.
  - The **Save & Previous** button will save the data and move to the previous screen.

*It is recommended that you save frequently to verify that data cells do not have missing or questionable data. If data are missing or questionable, a warning icon will appear. Click the icon to review the edit message and take the recommended*

action. (The icons are further explained in Section 6 Edit Review and Resolution.)




3. **Navigating the survey.** Use the **Tab** and **Shift+Tab** keys to move back and forth between the data entry boxes. The **Delete** and **Backspace** keys are active inside each data entry box.

NOTE: Your session will expire after 15 minutes of inactivity. Any data that have not been saved will be lost. Please be sure to save your responses frequently.

## 6 Edit Review and Resolution

Edit messages are generated for individual survey pages as data are saved (e.g., after clicking the **Verify & Save** button).

Each edit message is identified by a unique icon:

- **Fatal Error** (denoted with a red icon ). Either data are missing and must be provided, or the data entered must be corrected. Fatal errors must be resolved before you can submit the survey.
- **Confirm or Explain** (denoted with a yellow icon ). Indicates that the data are questionable. You should review the data for accuracy and enter correct data, if appropriate. If the questionable data are correct, you can resolve the edit message by entering an explanation in the **Justification** field in the Edit Report and clicking **Save Justification**. Providing a clear, concise explanation may eliminate the need for future follow-ups about the data. Please note that text entered in the Justification field will not be saved unless you click on one of the **Save Justification** buttons located at the top and bottom of the Edit Report.
- **Edit Reason (Accepted)** (denoted with a gray icon ). An explanation for questionable data has been provided.

The edit icons are linked to messages. Click an icon to go to the **Edit Report** that notes the edit message and the action required to resolve the message. You also may access the **Edit Report** option by clicking the button at the bottom of each page. Each edit message contains:

- Edit Code: The edit message number
- Line Number: The survey item
- Section: Survey section and page
- Message



- Value: The current-year or prior-year data that are related to the edit
- Justification: A text box to enter explanations, if applicable
- Accepted: The edit message resolution status — Yes or No

Links in the Section column may be used to go back to survey sections.

**INSTITUTE of Museum and Library SERVICES** **State Library**  
ADMINISTRATIVE AGENCY SURVEY

DASHBOARD      REPORTS      HELP      LOGOUT

Welcome Help Desk

### Edit Report

Please click [here](#) if you would like to refer to useful files (including Survey Instructions and the User's Guide) in the [Ready Reference Shelf](#).

Icon Description: ✖ Fatal error - must fix    ⚠ Confirm or explain    ◆ Edit reason  
[Download PDF Report](#)

**Note:**

1. Click on the links in the Section column to go back to survey sections.
2. Enter the justifications into the textboxes and click on the **Save Justification** button to save the entered text. The entered text is not saved until you click on the **Save Justification** button.

**Save Justification**

Edit Code	Line Number	Section	Message	Value	Justification	Accepted
630	<span style="color: yellow;">⚠</span> D_SV-010b	<a href="#">D: Services to Libs (D_SV-010a - D_SV-100e)</a>	The response this reporting period is different from the prior reporting period. Please check for possible errors or explain the difference.	Current Value: Directly; Prior Value: Not Provided	<input type="text"/>	No
630	<span style="color: yellow;">⚠</span> D_SV-010c	<a href="#">D: Services to Libs (D_SV-010a - D_SV-100e)</a>	The response this reporting period is different from the prior reporting period. Please check for possible errors or explain the difference.	Current Value: Contract; Prior Value: Not Provided	<input type="text"/>	No
503	<span style="color: red;">✖</span> K_FA-040a	<a href="#">K: Expenditures (K_FA-010a - K_TE-010d)</a>	Please enter a numeric value for this item.			No
524	<span style="color: red;">✖</span> D_PA-010b	<a href="#">D: Services to Libs (D_PA-010a - D_PA-060e)</a>	Must select a response.			No
524	<span style="color: red;">✖</span> D_PA-010c	<a href="#">D: Services to Libs (D_PA-010a - D_PA-060e)</a>	Must select a response.			No
503	<span style="color: red;">✖</span> K_OE-020d	<a href="#">K: Expenditures (K_AO-010a - K_OE-020d)</a>	Please enter a numeric value for this item.			No

Figure 7. Section links on the Edit Report screen

Enter the justification into the corresponding textbox and click the **Save Justification** button to save the entered text. The entered text is not saved until you click on the **Save Justification** button.

509	M-220	<a href="#">M. E Services (M-160a - M-230)</a>	Select yes or no for this item			No
509	M-230	<a href="#">M. E Services (M-160a - M-230)</a>	Select yes or no for this item			No
509	M-240	<a href="#">M. E Services (M-240 - M-270)</a>	Select yes or no for this item			No
509	M-250	<a href="#">M. E Services (M-240 - M-270)</a>	Select yes or no for this item			No
509	M-270	<a href="#">M. E Services (M-240 - M-270)</a>	Select yes or no for this item			No

[Save Justification](#)

OMB No. 3137-0072 Expires 1/31/2020

[Burden Statement](#)     
 [Accessibility](#)     
 [Privacy](#)     
 [Security](#)

Figure 8. The Save Justification button

When all edit messages are resolved, “Yes” will appear for each section in the **Accepted** column of the **Dashboard** and the **Submit Data** button will be enabled.

**NOTE:** All edit messages must be resolved by revising or confirming the data to lock and submit the survey. Changes to data may generate new edit messages that you will need to resolve.

## 7 Data Submission

When you complete the survey and all edit messages have been resolved, the **Edit Report** will display **Yes** in the **Accepted** column. To submit the data, click the **Submit Data** button on the **Dashboard** screen.

After clicking **Submit Data**, you will be asked to provide an estimate of the number of hours it took to complete the survey.

After clicking the **Submit Data** button, you will have two options:

- **Continue with Locking.** By clicking this button, you will finish the process of locking the data, and the system will send an e-mail to the State Librarian confirming that the data have been submitted and are ready for certification.
- **Return to Dashboard.** This button will navigate back to the survey without submitting the data.

After your survey is locked, you will still be able to view and print your data; however, you will not be able to make any changes to the data unless a request is submitted to the

SLAA Help Desk. *This action should not be a substitute for entering the correct data initially.*

If you discover a data error after locking your survey, contact the SLAA Help Desk at [SLAA@rti.org](mailto:SLAA@rti.org) or 1-866-509-7472. The Help Desk will assist in correcting any errors and resubmitting the data. The survey administrators will notify the State Librarian that previously locked data have been “unlocked” and certification will be required after the data are resubmitted.

## 8 State Librarian Certification

After the key holder locks the survey data, an e-mail message will be sent to the State Librarian describing the certification process. The e-mail will include a web link for the certification, as well as a user ID and password for authorization. The key holder will be notified by e-mail once the State Librarian certifies the data.

## 9 Post-Edit Survey Follow-up

After data submission, RTI analysts will review the data. After the review, a document containing any follow-up questions will be posted on the survey website. You will receive e-mail notification that this document is available for review. After you log in to the survey, the Dashboard will have a **Files Available for Download** section at the bottom with a link to the follow-up edit report. Click the link and save or open the file.

After providing explanations for each question, you will save the file and then upload it to the website.

To upload the document, follow these steps:

1. Click the link under the **File Uploads** section of the dashboard.
2. Click the **Browse** button to find the file that needs to be uploaded.
3. After selecting the file, click **Open** and then **Upload File**.

When providing explanations in the follow-up edit report, write responses in the column highlighted in yellow and labeled **Response**.

Changes to any other cells in the spreadsheet will not be reviewed. If there are problems providing an explanation in the table, please contact the RTI survey administrators.

## 10 Changes from the Prior Survey

### 10.1 Help Section

Contact information has been changed in the Help Section for the SLAA FY 2020 Survey. Contact the SLAA Help Desk at [SLAA@rti.org](mailto:SLAA@rti.org) or call 1-866-509-7472.

## 11 Logout

You may leave a session at any time using the **Logout** button found on the banner of each survey page.