

# Collect Connect Help

Winter 2018

<b>User Name and Password</b> .....	<b>3</b>
<b>Logging In</b> .....	<b>3</b>
<b>Recommended Browsers</b> .....	<b>3</b>
<b>Time Out</b> .....	<b>3</b>
<b>Surveys</b> .....	<b>3</b>
Current Surveys.....	4
Survey Status.....	5
Edit Checks .....	6
Unanswered Questions.....	7
Flagged Questions.....	8
Display Last Year’s Answers .....	8
Navigation .....	10
Answer Questions .....	11
Answer Fields .....	11
Repeating Groups .....	12
Flagging a Question.....	13
Enter a Note .....	13
Save Your Note.....	13
Submit Your Survey.....	14
Print and Save .....	15
Survey Reports .....	16
Annotation Reports.....	18

## User Name and Password

Click the **Forgot Your Username or Password?** link on the login page to retrieve a lost user name and/or password. A pre-populated email to Tech Support will open with a request for your library and state. You will receive a response within 24 hours. Alternatively, you can call Tech Support at 1-866-785-9935 to request immediate assistance.

[Return to Top](#)

## Logging In

Multiple people can be logged in the system at one time, but they cannot be in the same section at once. This means that it is possible to overwrite another person's answers. To avoid this possibility, make sure you are working in a different section than someone else.

[Return to Top](#)

## Recommended Browsers

All major web browsers are supported, including Edge, Internet Explorer, Chrome, Safari (when on a Mac), and Firefox. We recommend a screen resolution of 1024 by 768 or higher.

[Return to Top](#)

## Time Out

Your session will time out after 90 minutes of inactivity. Any information entered before the time out will be saved.

[Return to Top](#)

## Surveys

All of your surveys will display on the main Survey List page. The **Current Surveys** section contains any surveys that have not yet been completed. Completed surveys display within the **Other Surveys** section.

## Current Surveys

To open a current survey, click **Continue**. The survey will always open where you last left off, so you can easily continue working from your last stopping point.



You can easily [check your survey's current status \(1\)](#), [display last year's survey answers \(2\)](#), [navigate to a specific section within the survey \(3\)](#), and [answer survey questions \(4\)](#).

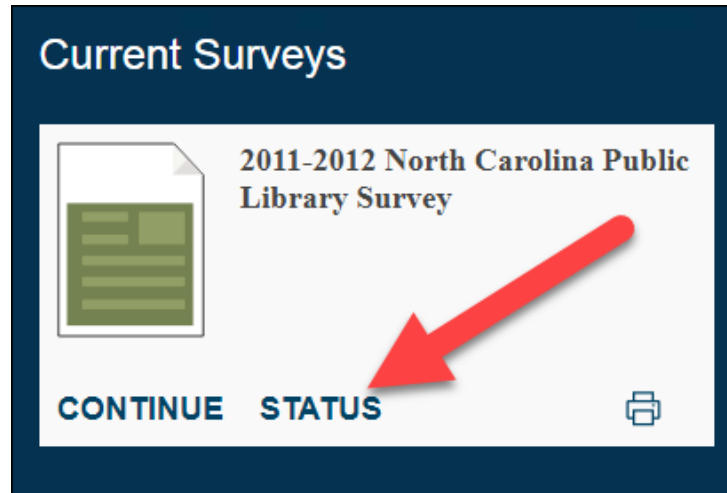
The screenshot displays the survey interface for the '2011-2012 North Carolina Public Library Survey'. At the top, there are two links: 'SHOW STATUS' and 'SHOW LAST YEAR'S ANSWERS'. Below these are two red circles with numbers '1' and '2'. A 'Survey Navigation' menu is on the left, listing various survey sections with a red circle '3' at the bottom. The main content area is titled 'Identification (#1-19)' and contains two questions. Question 1, 'Name of library system', has a text input field containing 'Wake County Library System' and a red circle '4' next to it. Question 2, 'County', has a text input field containing 'Mecklenburg'. Both questions have 'FLAG' and 'NOTE' icons to their right.

[Return to Top](#)

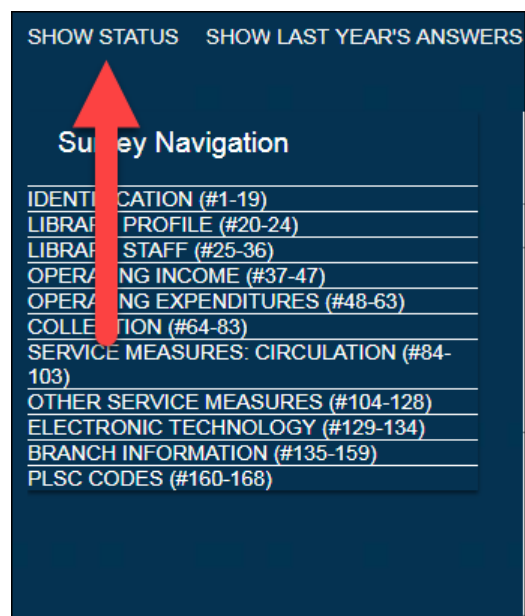
## Survey Status

There are two ways to view the status of a current survey:

- Click **Status** on the main Survey List page



- Click **Show Status** when you are within a survey



There are three sections to review within the Status section: [Edit Checks \(1\)](#), [Unanswered Questions \(2\)](#), and [Flagged Questions \(3\)](#).

[Return to Top](#)

## Edit Checks

Edit Checks have been created by the Institute of Museum and Library Services and/or your state library. These edit checks compare current fiscal year data to prior-year data, as well as (for example) fiscal comparisons of revenues and expenditures, etc. These Edit Checks will only appear after you've entered your data, and only if that data is outside the specified range. As an example, there could be a large change in the data reported for the current year, as compared to the previous year; the edit check will alert you to the issue and request that you ensure your current year's answer is correct. You will then be required to provide a reason for the change.

Instructions for satisfying the Edit Check display in red, as in the example below. The instructions also specify which type of note (Federal or State) is required for the explanation. If the instructions do not specify a note, you will need to correct the answer within the text field itself before you can successfully submit your survey.

Once you've entered the explanation and the correct note type has been saved, the edit check will display in green, as below.

<b>Personnel as of June 30, 2012</b>	
<b>27 TOTAL FTE MLS librarians (add lines 25 + 26)</b> <input type="text" value="14.00"/>	Total Librarians is greater than 10, Other Paid Employees should be greater than 0. Please explain why your data is out of the normal range using the Federal note. (Annotated Federal)
<b>FEDERAL</b>	<b>STATE</b>
<input type="text" value="This is where you will detail why your data is out of the normal range."/>	

[Return to Top](#)

## Unanswered Questions

Click on **Unanswered Questions** to view a list of all questions that are required but have not yet been answered. The **Unanswered Questions** drop-down defaults to **View Required Unanswered Questions**. This view displays all questions you must answer. To view all unanswered questions, whether required or not, select **View All Unanswered Questions** from the **Unanswered Questions** drop-down.

**Status** [Print] [SUBMIT] [SAVE]

**Edit Checks** **Unanswered Questions** **Flagged Questions**

Unanswered Questions View Required Unanswered Questions (selected) SHOW LAST YEAR'S ANSWERS  
View Required Unanswered Questions  
View All Unanswered Questions

Identification (#1-19)

6 Zip code extension (4-digits)

[FLAG] [NOTE]

Click **Save** once you've finished answering all questions.

[Return to Top](#)

## Flagged Questions

If you flagged any questions within the survey, you can review those questions by clicking **Flagged Questions**. Make any changes as needed, and then click **Save**.

The screenshot shows a survey interface with a dark blue header. The header contains the word "Status" on the left, a printer icon, and buttons for "SUBMIT" and "SAVE" on the right. Below the header are three tabs: "Edit Checks", "Unanswered Questions", and "Flagged Questions" (which is highlighted in blue). The main content area is titled "Flagged Questions" and includes a link for "SHOW LAST YEAR'S ANSWERS". Underneath, there is a section for "Identification (#1-19)". Two questions are listed: "1 Name of library system" and "3 Mailing address". Each question has a text input field, a "FLAG" button (represented by a red flag icon), and a "NOTE" button (represented by a pencil icon). The input fields contain "Wake County Library System" and "123 Main Street" respectively. Below the input fields, the text "Wake County Library System" and "101 Main Street" is displayed, indicating that previous answers are shown.

[Return to Top](#)

## Display Last Year's Answers

If you want to display your answers from last year's survey, click **Show Last Year's Answers**.

The screenshot shows the top of a survey titled "2011-2012 North Carolina Public Library Survey". Below the title are two links: "SHOW STATUS" and "SHOW LAST YEAR'S ANSWERS". A large red arrow points to the "SHOW LAST YEAR'S ANSWERS" link. Below the links is a "Survey Navigation" menu with a list of sections: "IDENTIFICATION (#1-19)", "LIBRARY PROFILE (#20-24)", "LIBRARY STAFF (#25-36)", "OPERATING INCOME (#37-47)", and "OPERATING EXPENDITURES (#48-63)". To the right of the navigation menu is a section titled "Identification (#1-19)" with a question "1 Name of library system" and an input field.

Answers from the previous year's survey will display below the answer field for each question.



2 County

Mecklenburg

Wake

To display last year's answers within the Edit Check section, click **Show Last Year's Answers**.

Status PRINT SUBMIT SAVE

[Edit Checks](#) [Unanswered Questions](#) [Flagged Questions](#)

Edit Checks for Review SHOW LAST YEAR'S ANSWERS

Library Profile (#20-24)

Click **Hide Last Year's Answers** to prevent the previous year's survey answers from displaying.

2011-2012 North Carolina Public Library Survey

SHOW STATUS [HIDE LAST YEAR'S ANSWERS](#)

Survey Navigation

- IDENTIFICATION (#1-19)
- LIBRARY PROFILE (#20-24)
- LIBRARY STAFF (#25-36)
- OPERATING INCOME (#37-47)
- OPERATING EXPENDITURES (#48-63)

Identification (#1-19)

1 Name of library system

Status PRINT SUBMIT SAVE

[Edit Checks](#) [Unanswered Questions](#) [Flagged Questions](#)

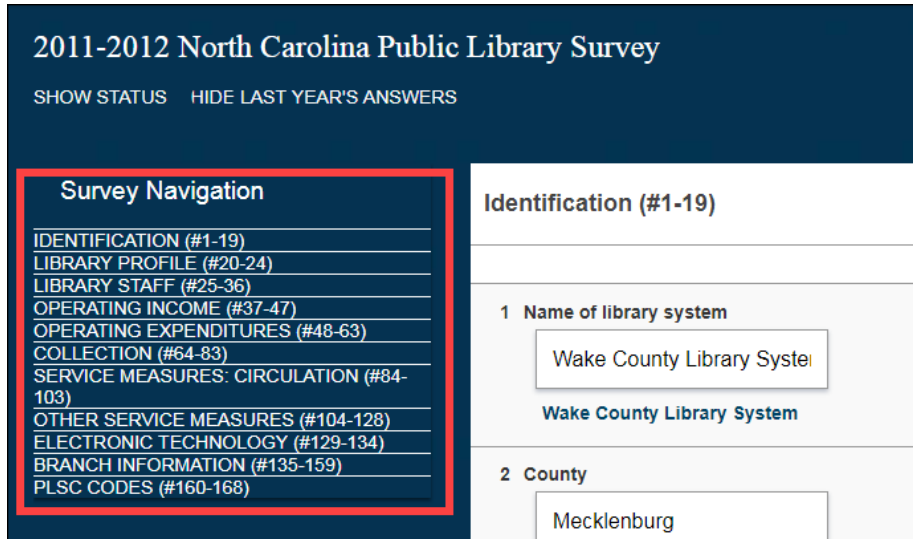
Edit Checks for Review HIDE LAST YEAR'S ANSWERS

Library Profile (#20-24)

[Return to Top](#)

## Navigation

Use the links under **Survey Navigation** to easily jump to a specific section within the current survey.



2011-2012 North Carolina Public Library Survey

SHOW STATUS HIDE LAST YEAR'S ANSWERS

**Survey Navigation**

- IDENTIFICATION (#1-19)
- LIBRARY PROFILE (#20-24)
- LIBRARY STAFF (#25-36)
- OPERATING INCOME (#37-47)
- OPERATING EXPENDITURES (#48-63)
- COLLECTION (#64-83)
- SERVICE MEASURES: CIRCULATION (#84-103)
- OTHER SERVICE MEASURES (#104-128)
- ELECTRONIC TECHNOLOGY (#129-134)
- BRANCH INFORMATION (#135-159)
- PLSC CODES (#160-168)

**Identification (#1-19)**

1 Name of library system

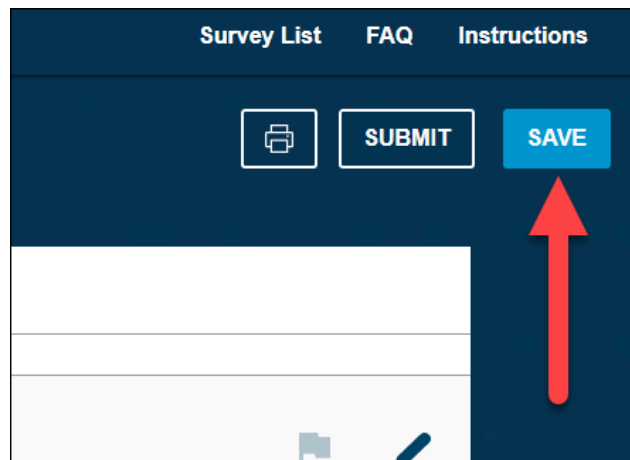
Wake County Library System

Wake County Library System

2 County

Mecklenburg

To save your progress as you move through the survey, click the **Save** button in the upper right corner of the page. Please note that your data will be saved automatically as you page through the system; however, if you need to stop in the middle of a page, click **Save** to save your answers before logging out of the survey.



Survey List FAQ Instructions

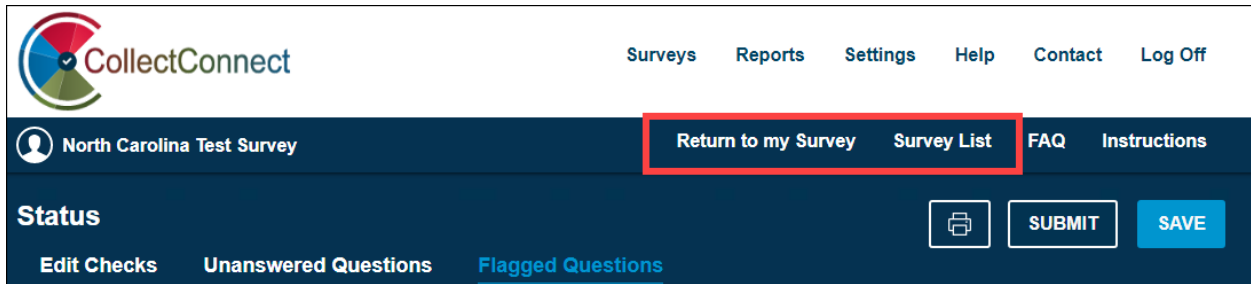
PRINT SUBMIT SAVE

Use the **Previous** and **Next** buttons at the bottom of the page to go forward and backward throughout the survey.



PREV NEXT

Click on **Return to my Survey** to easily return to the questions in the current survey. Click **Survey List** to go back to the Survey home page, where you can view all current and past surveys.



[Return to Top](#)

## Answer Questions

You have a few options when answering questions. Enter your answer for each question in the provided field (1), flag a question for later review (2), enter a note (3), save or discard your note (4).


A screenshot of a survey question interface. The question is "1 Name of library system". There is a text input field containing "Wake County Library System" with a red circle "1" next to it. Below the input field is the text "Wake County Library System" with a red circle "2" next to it. To the right of the input field are two icons: a red flag icon labeled "FLAG" and a blue pencil icon labeled "NOTE". Below these icons are two radio buttons: "FEDERAL" (selected) and "STATE", with a red circle "3" next to the "FEDERAL" button. Below the radio buttons is a text area containing "test note - federal". At the bottom right of the form are two buttons: "CLOSE" and "SAVE", with a red circle "4" next to the "CLOSE" button.

## Answer Fields

Simply enter your answer for each question in the provided text field. Some questions will require numeric answers, while others will require alphanumeric answers. Any additional instructions pertaining to what you need to enter in the associated field will display above the text field.

Some questions include a helpful explanation. Click on the **question mark icon** to bring up a pop-up window.

23 Number of other mobile units



When you are finished reading the information in the pop-up window, click **OK** to exit and return to your survey.

Other vehicles or vans used for library programming (e. g., service to daycare centers, senior centers, etc.) that do not meet the definition of "bookmobile" above.

**OK**

You cannot enter data in text fields that are grayed out. These fields have been locked upon request by the SDC. Data in these fields is typically pre-populated and cannot be modified.

27 **TOTAL FTE MLS librarians (add lines 25 + 26)**

[Return to Top](#)

### **Repeating Groups**

A Repeating Group is a set of questions used for reporting multiple instances of the same type of information. For example, repeating groups are used to collect the same type of information about a library's branches, trustees, sources of income, contracting municipalities, and so on. You can add as many sets of repeating groups as needed. Some libraries have three, and will require three sets of repeating groups, while others will require two sets, and still others will not require any repeating groups.


To add a set of repeating group questions (for a new branch, as an example), click **Add Group**. To remove an existing group, click **Remove Group** below the group you want to delete.

**REMOVE GROUP** **ADD GROUP**

Remember to click **Save** at the top of the page each time you add and remove a group, to make sure that your changes are saved before moving on to another survey section.

[Return to Top](#)

### **Flagging a Question**


Click on the **Flag** icon  to flag a question for later review. The flag icon will turn red, indicating that you've successfully flagged the question. See the [Flagged Questions](#) section to learn more about how to view your flagged questions.

To remove the flag from a question, click on the flag icon again. It will display in gray, which indicates that it is no longer flagged.

Please note that the flag is for your use only: you cannot flag a question to draw attention to it after submission.

[Return to Top](#)

### **Enter a Note**

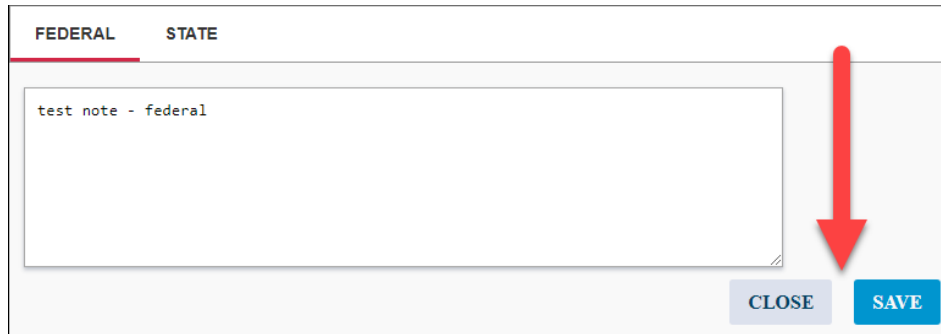
Some questions require that you enter additional information in a note. Click on the **Note** icon  to open the note field. There are three types of notes: **Local**, **Federal**, and **State**. See the [Edit Check](#) section for information about how to use notes to clarify data that falls outside of the standard range.

Notes can be added to any question, to satisfy an edit check, or to enter information for your own purposes.

[Return to Top](#)

### **Save Your Note**

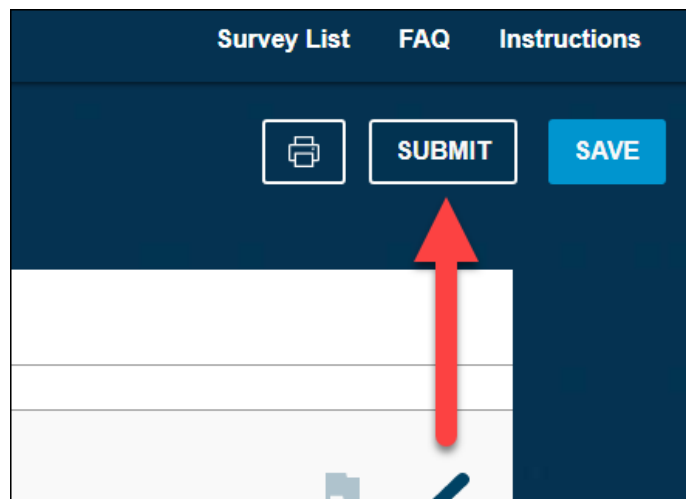
Click **Save** to save the note. Click **Close** to erase your text and return to the question.



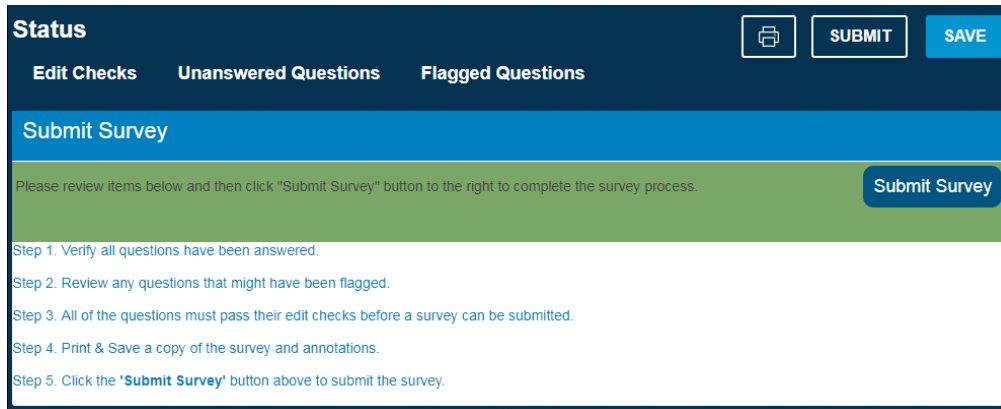
[Return to Top](#)

## Submit Your Survey

When you're ready to submit your survey, click the **Submit** button in the upper right corner of the page. The system will automatically check your survey for any errors.



If any errors or areas that need attention are found, they will display on the following screen. You'll need to review all [unanswered](#) and [flagged](#) questions (optional), pass all [edit checks](#), and [print/save](#) a copy of your survey before submission (optional). You must resolve any edit checks received, and you must answer all required questions



As a best practice, you should [print and/or save your survey](#) before submission, to ensure that you have a copy for your records. Your survey will be locked from further editing once you submit it. This means you will not be able to make any further changes; however, you can still [print and save](#) your survey.

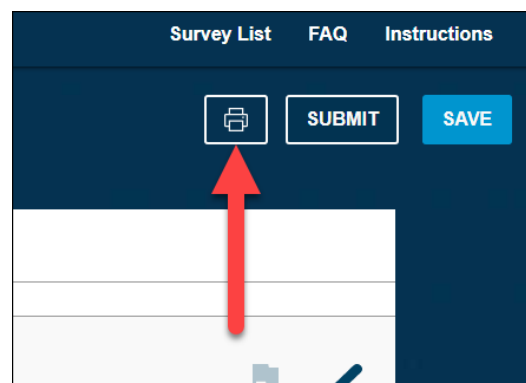
Click **Submit Survey** to formally submit your survey. You can submit your survey only after all edit checks have been successfully corrected.

[Return to Top](#)

## Print and Save

You may want to save and/or print a copy of your survey for your records at any time before submission. There are two places to print:

- Click the **Print icon** while in the current survey



- Click the **Print icon** next to the survey you want to print on the home page. Please note that submitted surveys can only be printed.



The Print page displays. From here, you can select **Survey Reports** or **Annotation Reports**.

[Return to Top](#)

## Survey Reports

Select **Survey Reports** to print your survey without any notes. You can print the entire survey, or individual sections. Only one individual section can be printed at a time.

Select exactly what information you want to view on the report:

- **Current Year's Data** – Print the survey with only the current year's data.
- **Without Data** – Print a blank version of the survey.
- **With Current and Last Year's Data** – Print the survey with both current year and last year's data.

Click **Show Web Report** to view the report in another window in HTML format. Click **Show PDF Report** to save the report as PDF. The only difference between the HTML and PDF versions of the report is that the HTML version does not contain breaks between sections, which saves



paper. The PDF version can be used as a formal report if needed, or can be shared with local governing bodies, etc. You can also share the report with the multiple users who are responsible for providing information for different areas within the survey.

Below is an example of what the Survey Report looks like in HTML view, with some information blurred for privacy purposes.

<b>North Carolina Test Survey</b>		
<b>2010-2011 North Carolina Public Library Survey</b>		
<b>Identification (#1-19)</b>		
1	Name of library system	Wake County Library System
2	County(ies)	Wake
3	Mailing address	[blurred]
4	City (of mailing address)	[blurred]
5	Zip code (5-digit standard)	12345
6	Zip code extension (4-digits)	1234
7	Street address	[blurred]
8	City (of street address)	[blurred]
9	Zip code (5-digit standard)	28245
10	Zip code extension (4-digits)	2322
11	Name of library director	[blurred]
12	Library director's phone number (including area code; omit spaces and punctuation)	[blurred]
13	Library administration's fax number (including area code; omit spaces and punctuation)	[blurred]
14	Library director's e-mail address	[blurred]
<b>Person Completing Form</b>		
15	Name	Jane Smith
16	Title	Assistant Admin
17	Phone number (including area code; omit spaces and punctuation)	(555) 555-5555
18	Fax number (including area code; omit spaces and punctuation)	(919) 555-5555
19	E-mail address	[blurred]

[Return to Top](#)

## Annotation Reports

Select **Annotation Reports** to print only the notes from your survey. You can print the notes for the entire survey at once, or print only individual sections. Only one individual section can be printed at a time.

The screenshot shows a web interface for generating reports. At the top, there are two tabs: "Survey Reports" and "Annotation Reports", with the latter being selected and underlined. Below the tabs, the interface is divided into two main sections:

- 1. Survey Notes:** This section contains two checkboxes: "FEDERAL NOTES" and "STATE NOTES". Both are currently unchecked.
- 2. Survey Sections:** This section contains two radio buttons: "ALL SECTIONS" and "SPECIFIC SECTION". The "SPECIFIC SECTION" radio button is selected. To the right of the radio buttons is a dropdown menu with the text "Operating Income (#37-47)" and a downward arrow.

At the bottom of the form, there are two blue buttons: "SHOW WEB REPORT" and "SHOW PDF REPORT". Below these buttons, a note reads: "Please note: Generating this report may take several minutes".

Select **Federal Notes** and/or **State Notes** to print the associated notes on your report.

To print the entire report, select **All Sections**. If you want to print only a certain section of the report, select that section from the **Specific Section** drop-down.

Click **Show Web Report** to view the report in another window in HTML format. Click **Show PDF Report** to save the report as PDF. The only difference between the HTML and PDF versions of the report is that the HTML version does not contain breaks between sections, which saves paper. The PDF version can be used as a formal report if needed, or can be shared with local governing bodies, etc. You can also share the report with the multiple users who are responsible for providing information for different areas within the survey.

Below is an example of what an Annotated Report looks like in HTML view.

**North Carolina Test Survey  
2010-2011 North Carolina Public Library Survey**

Federal Notes  
State Notes  
Local Notes

**Identification (#1-19)**

- |    |   |  |
|----|---|--|
| 1  | Name of library system  | <b>Local Note:</b> 2011 Note<br><b>State Note:</b> 2011 Note<br><b>Federal Note:</b> 2011 Note |
| 14 | Library director's e-mail address                             | <b>Federal Note:</b> This is a federal note.   |
| 18 | Fax number (including area code; omit spaces and punctuation) | <b>Local Note:</b> This is a local note.   |

**Library Profile (#20-24)**

- |    |                             |  |
|----|-----------------------------|--|
| 20 | Number of central libraries | <b>State Note:</b> Will be re-modeling this year.<br><b>Federal Note:</b> Test |
| 21 | Number of branch libraries  | <b>Federal Note:</b> Test  |
| 22 | Number of bookmobiles       | <b>Federal Note:</b> Test  |

[Return to Top](#)