Collect Connect Help

Winter 2018

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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.

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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.

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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.

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Time Out

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

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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.

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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)**.
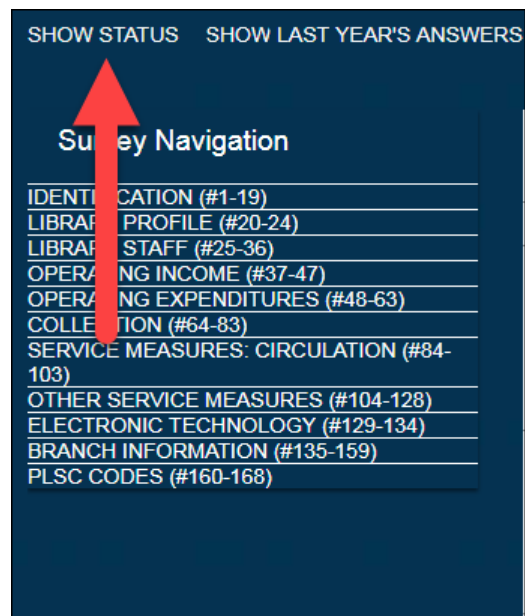

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Survey Status

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)**.

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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.

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

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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.

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

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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**.

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Display Last Year's Answers

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

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

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

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

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Navigation

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

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.

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

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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.
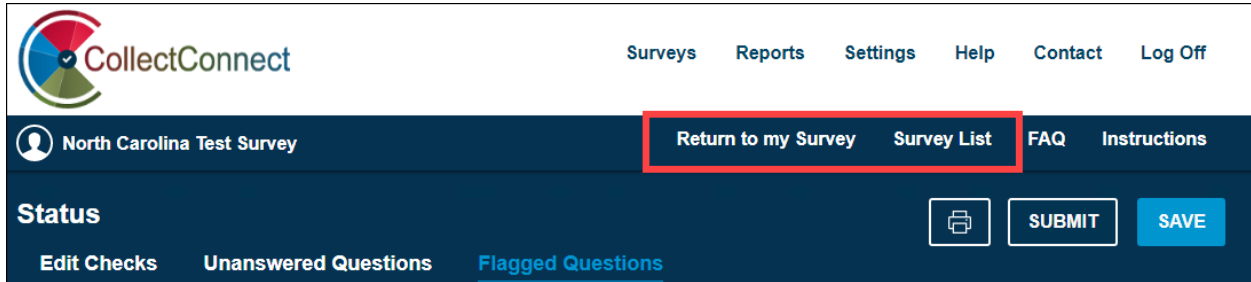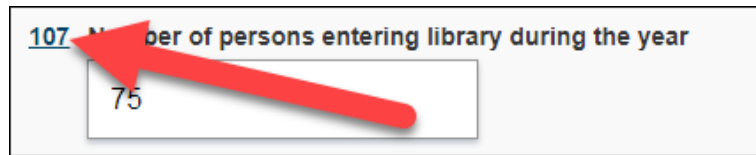
Answer Questions

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)**.

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 are hyperlinked to a helpful explanation. Click on the **question number** to bring up a pop-up window.
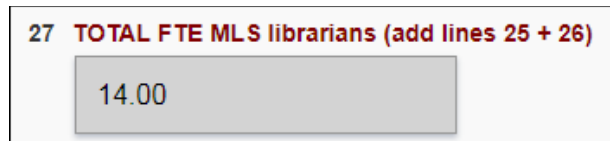
When you are finished reading the information in the pop-up window, click the X to exit and return to your survey.

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.

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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.

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.

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Flagging a Question

Click on the **Flag** icon FLAG 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.

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Enter a Note

Some questions require that you enter additional information in a note. Click on the **Note** icon NOTE 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.

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Save Your Note

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

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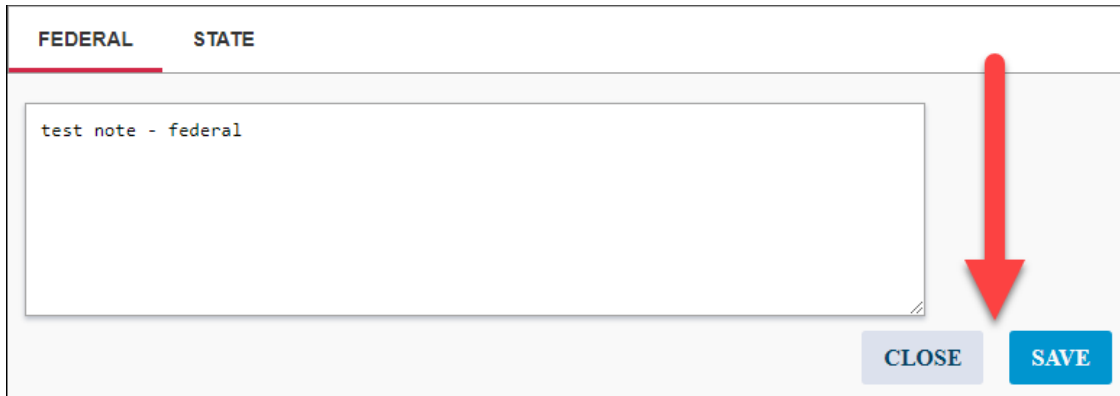
Submit Your Survey

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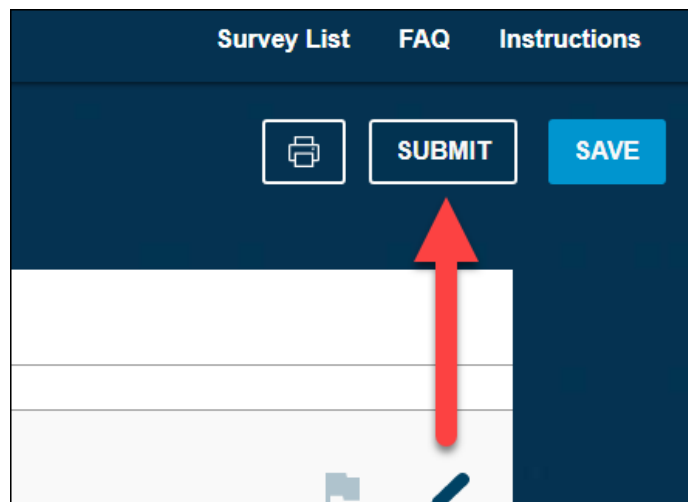
If any errors or areas that need attention are found, they will display on the following screen. You'll need to review all unanswered and flagged questions (optional), pass all edit checks, and print/save a copy of your survey before submission (optional). You <u>must</u> resolve any edit checks received,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

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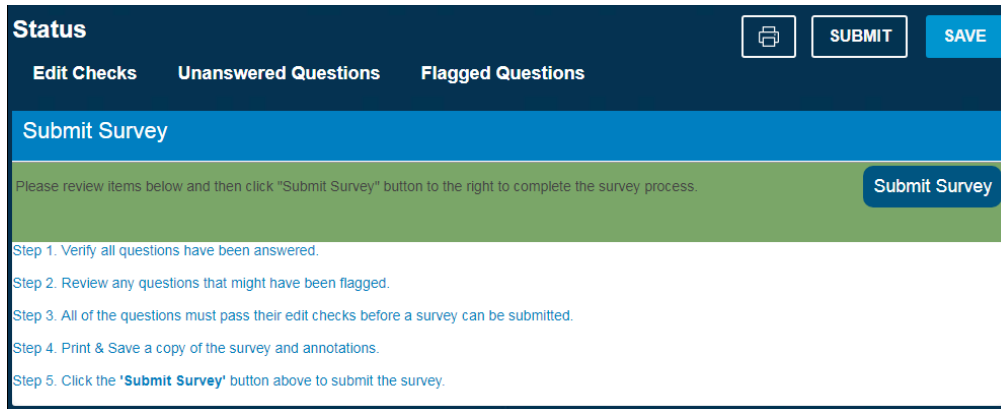
As a best practice, you should print and/or save your survey before submission, to ensure that you have a copy for your records. Your survey will be locked from further editing once you submit it. This means you will not be able to make any further changes; however, you can still print and save your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

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

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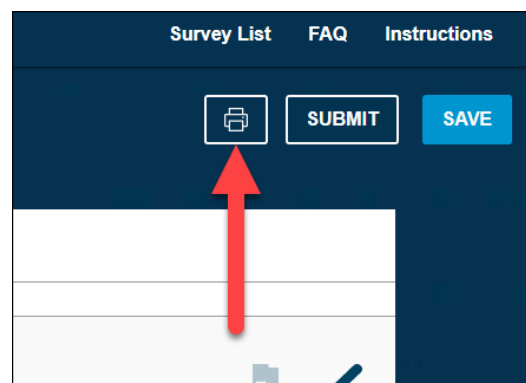
- Click the **Print icon** next to the survey you want to print on the home page. Please note that submitted surveys can only be printed.

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

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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

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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 HMTL view, with some information blurred for privacy purposes.

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

Identification (#1-19)

1	Name of library system	Wake County Library System
2	County(ies)	Wake
3	Mailing address	
4	City (of mailing address)	
5	Zip code (5-digit standard)	12345
6	Zip code extension (4-digits)	1234
7	Street address	
8	City (of street address)	
9	Zip code (5-digit standard)	28245
10	Zip code extension (4-digits)	2322
11	Name of library director	
12	Library director's phone number (including area code; omit spaces and punctuation)	
13	Library administration's fax number (including area code; omit spaces and punctuation)	
14	Library director's e-mail address	

Person Completing Form

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	

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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.

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	**Local Note:**	2011 Note
		State Note:	2011 Note
		Federal Note:	2011 Note
14	Library director's e-mail address	**Federal Note:**	This is a federal note.
18	Fax number (including area code; omit spaces and punctuation)	**Local Note:**	This is a local note.

Library Profile (#20-24)

20	Number of central libraries	**State Note:**	Will be re-modeling this year.
		Federal Note:	Test
21	Number of branch libraries	**Federal Note:**	Test
22	Number of bookmobiles	**Federal Note:**	Test

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