



# CollectConnect Surveys Help Documentation

v. 2024

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## Username and Password

Click the **Forgot Your Username or Password?** link on the login page to retrieve a lost username 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, 1-866-785-9935, to request immediate assistance.

## Logging In

At the start of each new survey, users will be prompted to enter, update, or confirm their contact details.

The screenshot displays the 'STATE LIBRARY SURVEY 2023' interface. A white notification box at the top states 'collectconnectuat.baker-taylor.com says Contact Details Saved Successfully.' with an 'OK' button. Below this, a 'CONTACT DETAILS' form is shown with the following fields: NAME (Jan Anderson), PHONE ((908) 541-0000), and EMAIL (jan.anderson@baker-taylor.com). The form includes 'EDIT' and 'CONFIRM' buttons.

More than one user can be active in a survey at any point in time. For instance, one user may be responsible for entering financial information while another is responsible for collection information. Whenever more than one person is logged in, Collect will display an alert banner at the top of the page which will include the contact information for the other(s) that are currently logged into the survey.

The alert information will make it easy for users to communicate and coordinate their activities so that they do not overwrite one another's work.

## Recommended Browsers

All major web browsers are supported, including Chrome, Edge, Firefox and Safari (on a Mac). Chrome and Edge are the preferred browsers. We recommend a screen resolution of 1920 x 1080 or higher.

## Time Out

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

**YOUR SESSION HAS TIMED OUT**

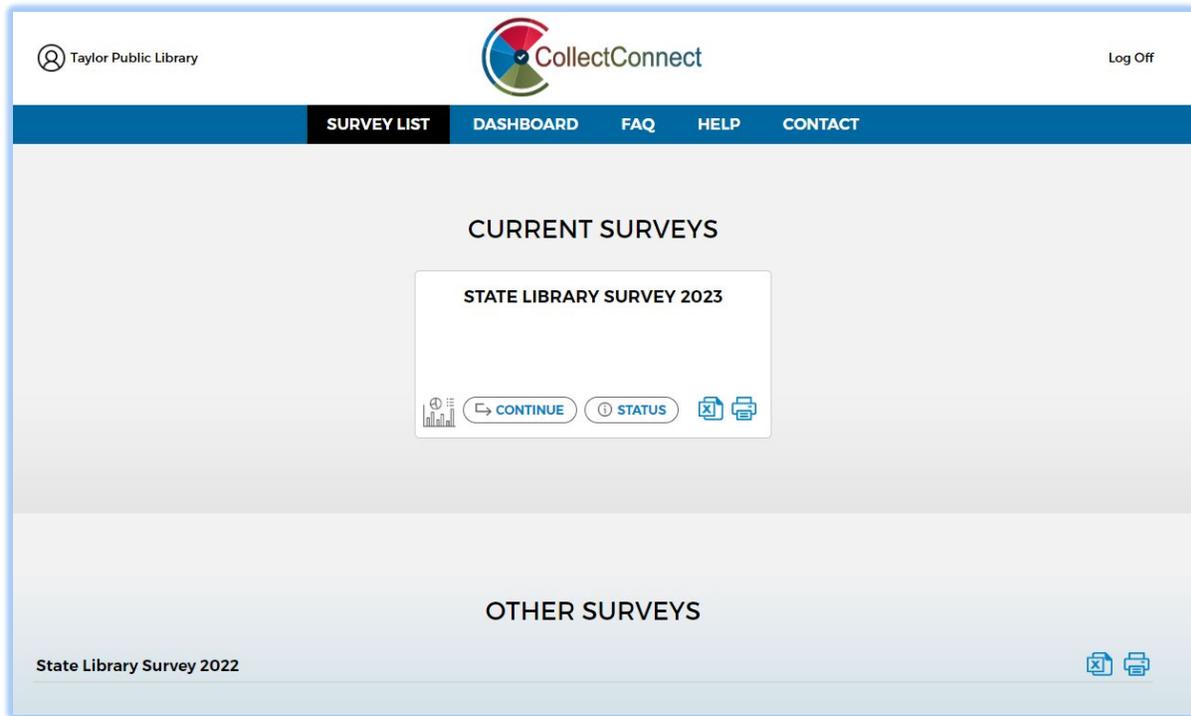
You have been idle for quite some time now. For security reasons your session is limited to 90 minutes of idle time. The data you may have been working on has automatically been saved.

To continue please log back into your account.

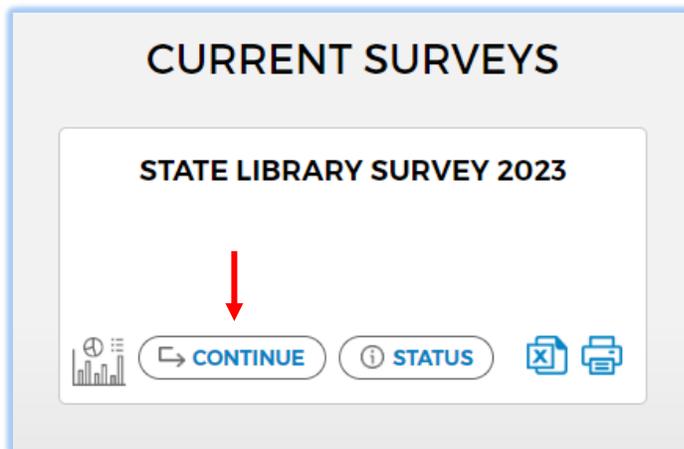
[LOGIN](#)

## Surveys

All your library's surveys are displayed on the main Survey List page. The **Current Surveys** section contains surveys that have not yet been completed. Prior year surveys are listed below under **Other Surveys**.



Click CONTINUE on the Current Surveys card to resume working in the current survey. The survey will open to your last editing position.



Click STATUS to view and access EDIT CHECKS, UNANSWERED QUESTIONS and FLAGGED QUESTIONS

You can export the survey questions and answers to Excel by clicking the Excel icon  .

You can print the survey by clicking on the Print icon  .

While in the survey you can easily check your survey's current status (1), Show or Hide last year's survey answers (2), navigate to a specific section within the survey (3), and answer survey questions (4).

The screenshot displays the CollectConnect survey interface for the State Library Survey 2023. At the top, the Taylor Public Library logo and CollectConnect branding are visible, along with a Log Off button. The navigation bar includes links for SURVEY LIST, DASHBOARD, FAQ, INSTRUCTIONS, HELP, and CONTACT. The main heading is "STATE LIBRARY SURVEY 2023".

On the left, the "SURVEY NAVIGATION" menu lists sections: General Information #1.1-1.17, Personnel #2.1-2.5, Collections #3.1-3.10, Income #4.1-4.14 (circled 3), Expenditures #5.1-5.13, Services #6.1-6.15, Programs #7.1-7.20, and Outlet Information #8.1-8.11.

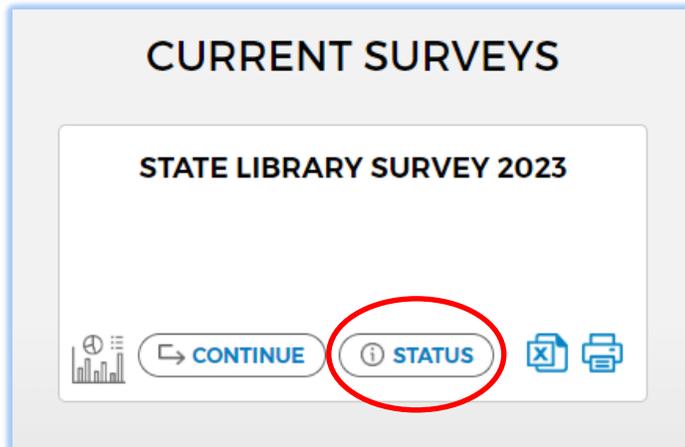
The main content area shows the "GENERAL INFORMATION #1.1-1.17" section. At the top of this section, there are buttons for STATUS (circled 1), EXPORT, PRINT, and SUBMIT, along with NEXT and SAVE buttons. A "HIDE Last Year's Answers" button (circled 2) is also present. Below this, a banner for "BAKER & TAYLOR" is displayed, followed by the text "Survey Due Date November 1, 2024".

The form contains two questions: "1.1 Name of Library" and "1.2 Street Address". The input field for "1.1 Name of Library" (circled 4) includes a question mark icon and options for FLAG, NOTE, and HISTORY.

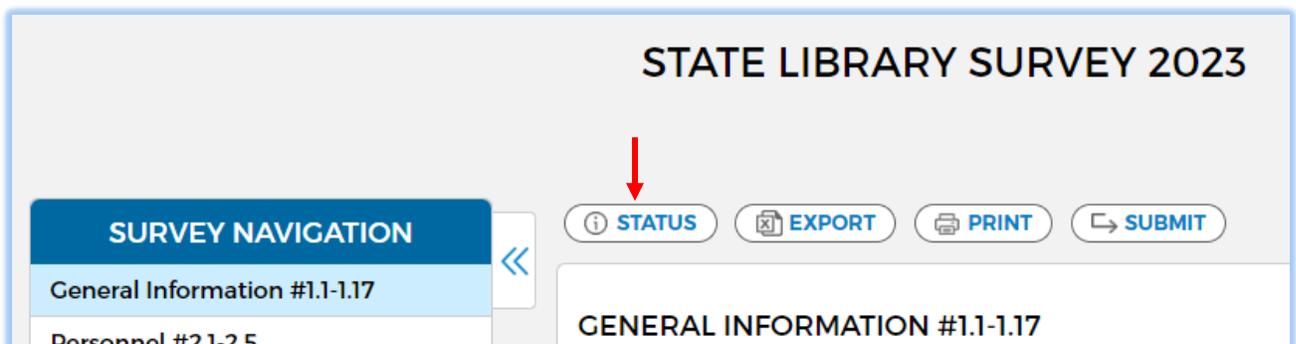
## Survey Status

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

- Click **Status** on the Current Survey card at the top of your Survey List page



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



There are three tabbed sections on the Status page: Edit Checks (1), Unanswered Questions (2), and Flagged Questions (3).

## Edit Checks

Edit Checks are created by the Institute of Museum and Library Services and/or your state library agency. Baker & Taylor conditions each year's survey with the then current edit checks specified by IMLS or your State Library. These edit checks compare current year data you have entered to prior-year data. Collect will alert you to check an entry or to provide a note to explain the variance if an answer falls outside of a specified range. Edit Checks will automatically appear after you've entered your data if the entered data falls 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. Edit checks will alert you and detail the reason why the error is being triggered. You can edit your response, if needed, directly in the data entry field. You will also be prompted to create a Note, if one is required, to explain a variance.

**ERRORS** [GO STATUS PAGE](#)

**PAID STAFF ( FULL-TIME EQUIVALENT ) ( 3.1-3.9 )**

3.4 All other paid staff (include maintenance staff)

?

**LAST YEAR'S ANSWER: 6.00**

 1) Prior year is greater than 1.5 and current year is 0. Please check the current year value for possible error or provide an explanation for the change in a Federal note.

A red triangle with white exclamation point will appear alongside entries that have triggered an Edit Check. The instructions to the right of the icon will detail the error condition and specify which type of note (Federal or State) is required for 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 a green checkmark alongside the instructions, as below.

**STATUS**

[PRINT](#) [SUBMIT](#) [SAVE](#)

**EDIT CHECKS (1)** **UNANSWERED QUESTIONS (0)** **FLAGGED QUESTIONS (0)**

**EDIT CHECKS FOR REVIEW** [SHOW](#) [LAST YEAR'S ANSWERS](#)

**HOLDINGS**

H41 Total Downloadable Video (H7 + H18 + H29)

**LAST YEAR'S ANSWER: 805**

 1) Prior year is greater than 0 and current year is 0. Please check the current year value for possible error or provide an explanation for the change in a Federal note.  
(Annotated Federal)

**FEDERAL** **STATE** **LOCAL** **PREVIOUS YEAR**

Downloadable video no longer in Overdrive.

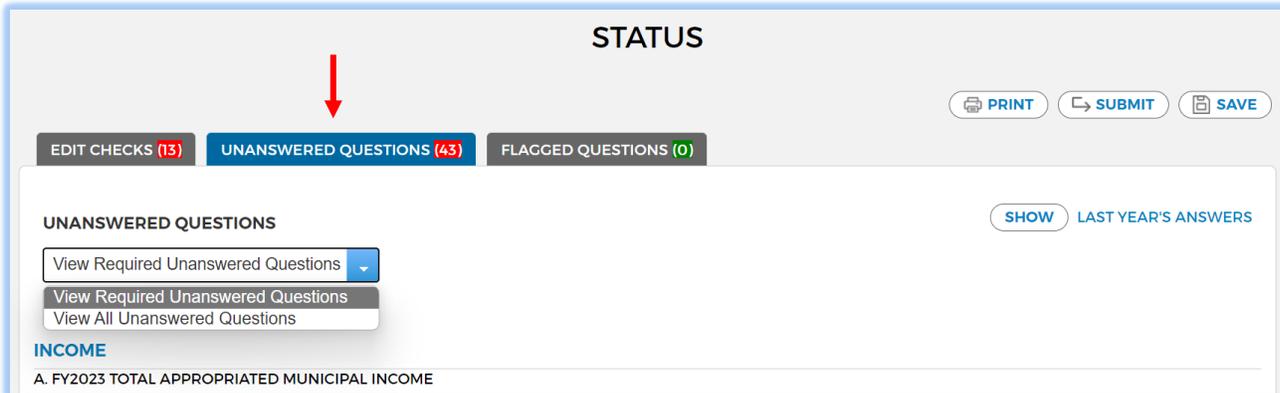
You can view all questions that require review of Edit Checks by clicking on the EDIT CHECKS tab.

## Unanswered Questions

Click on the **UNANSWERED QUESTIONS** tab to view questions for which no entries have been made. The view of **UNANSWERED QUESTIONS** will default to the **View Required Unanswered Questions** option. This view displays all questions you must answer.

To view all unanswered questions, whether they are required to be answered or not, select **View All Unanswered Questions**.

**IMPORTANT NOTE:** *When answering or editing question responses via the Status page you must click the SAVE button to retain your inputs!*



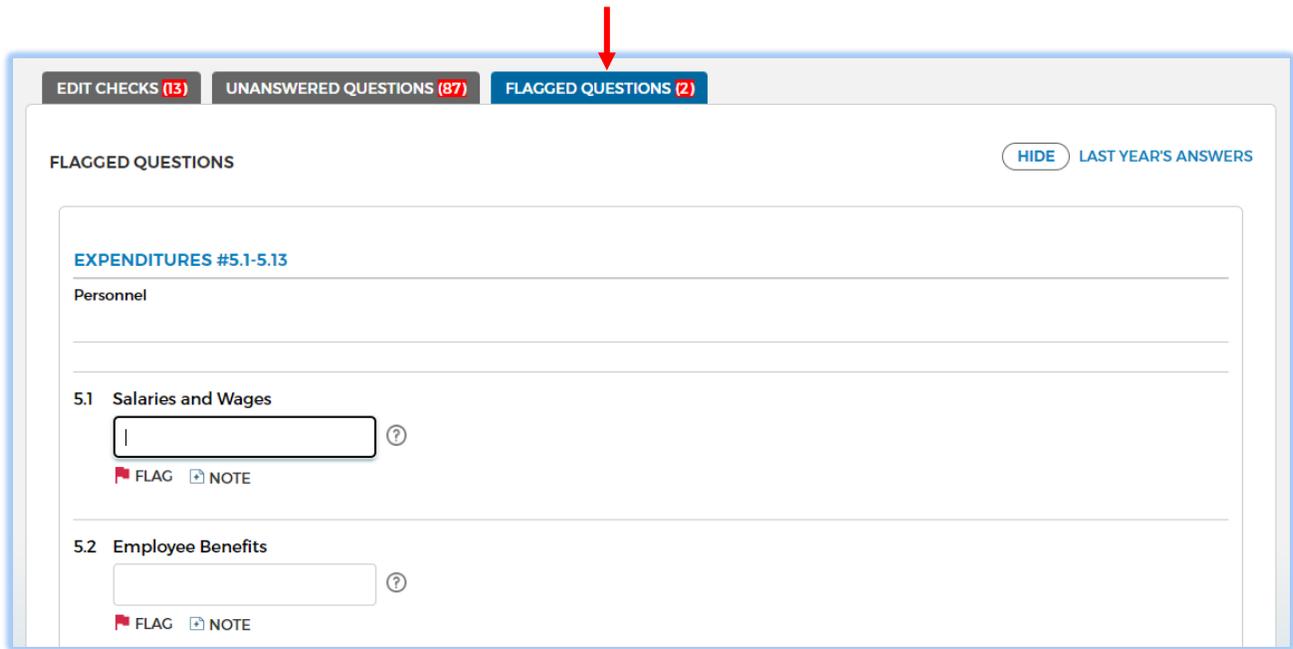
The screenshot shows the 'STATUS' page interface. At the top, there are three tabs: 'EDIT CHECKS (13)', 'UNANSWERED QUESTIONS (43)', and 'FLAGGED QUESTIONS (0)'. A red arrow points to the 'UNANSWERED QUESTIONS (43)' tab. To the right of the tabs are three buttons: 'PRINT', 'SUBMIT', and 'SAVE'. Below the tabs, there is a section titled 'UNANSWERED QUESTIONS' with a 'SHOW' button and a link for 'LAST YEAR'S ANSWERS'. A dropdown menu is open under 'UNANSWERED QUESTIONS', showing two options: 'View Required Unanswered Questions' (selected) and 'View All Unanswered Questions'. Below this, the 'INCOME' section is visible, starting with 'A. FY2023 TOTAL APPROPRIATED MUNICIPAL INCOME'.

## Flagged Questions

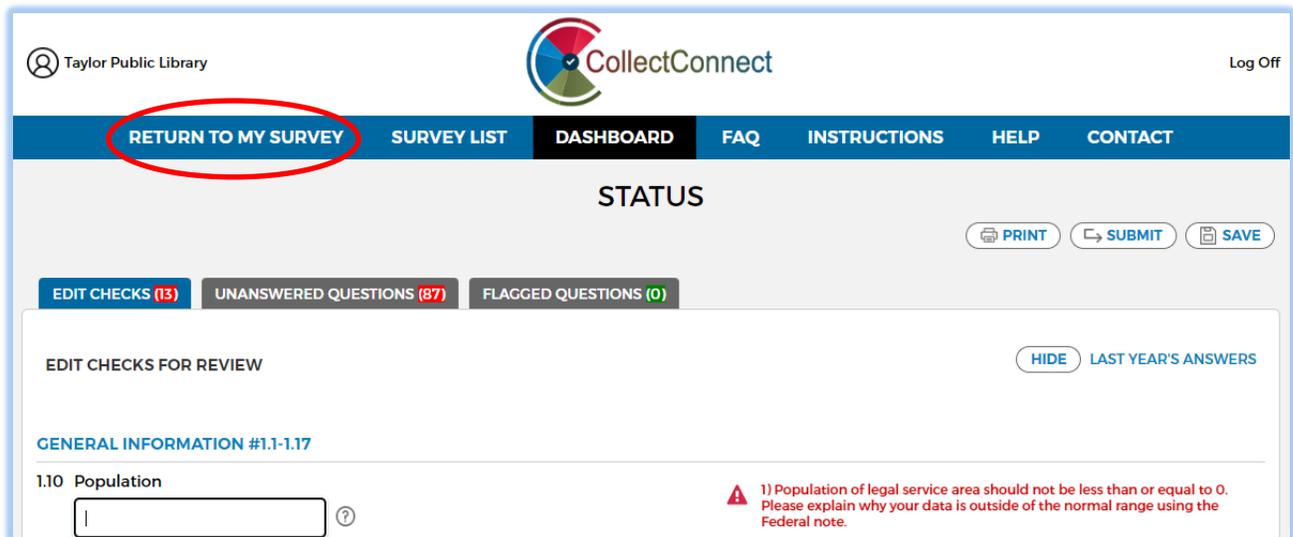
Click on the header tab **FLAGGED QUESTIONS** to be taken to the full list of questions that you have flagged for follow up.

You can make entries directly in the answer fields, if desired.

**Remember to click SAVE after making entries on the STATUS page!**



You can navigate back to your survey by clicking **RETURN TO MY SURVEY** in the header area. The survey will open to the page you were last working on.



## Show or Hide Last Year's Answers

Display of Last Year's Answers in surveys is enabled by default. Last Year's Answers will display in blue text below the data entry field for each question that was answered in the prior year survey. The Show / Hide button is a toggle to enable or disable the display of last year's answers. To disable the UI display of Last Year's Answers, click on the Hide button.

PAID STAFF ( FULL-TIME EQUIVALENT ) ( 3.1-3.9 ) HIDE Last Year's Answers

Click on question mark for help

Remember: to compute the FTE (full-time equivalent) of a part-time employee, divide the number of hours worked per week by 40. Thus, an employee working 20 hours per week equals .50 FTE (20/40 =.50), and an employee working 16 hours per week equals .40 FTE (16/40=.40).

Do not include volunteers in the FTE calculation.

3.1 Librarians with master's degree from an ALA-accredited program

?

LAST YEAR'S ANSWER: 4.00

FLAG + NOTE HISTORY

1) Prior year is greater than 1 and current year is 0. Please check the current year value for possible error or provide an explanation for the change in a Federal note.

Answers for additional prior years can be invoked by clicking the History icon below the data entry field.

3.1 Librarians with master's degree from an ALA-accredited program

?

LAST YEAR'S ANSWER: 4.00

FLAG NOTE HISTORY

YEAR	RESPONSE
2021	3.00
2020	3.00
2019	3.00
2018	4.00
2017	4.00

1) Prior year is greater than 1 and current year is 0. Please check the current year value for possible error or provide an explanation for the change in a Federal note.

Note: When Last Year's Answers is set to **Hide**, the History table will show data for the previous five years.

When Last Year's Answers is set to **Show**, the History table will show five years of data prior to last year, in combination providing six years' answers in full.

*Additional Note: When Show Last Year's Answers toggle is active, last year's data will also be displayed on the Edit Check screens.*

EDIT CHECKS (52) UNANSWERED QUESTIONS (122) FLAGGED QUESTIONS (0)

EDIT CHECKS FOR REVIEW HIDE LAST YEAR'S ANSWERS

SERVICE AREA (2.1-2.10)

2.1 Population of legal service area

?

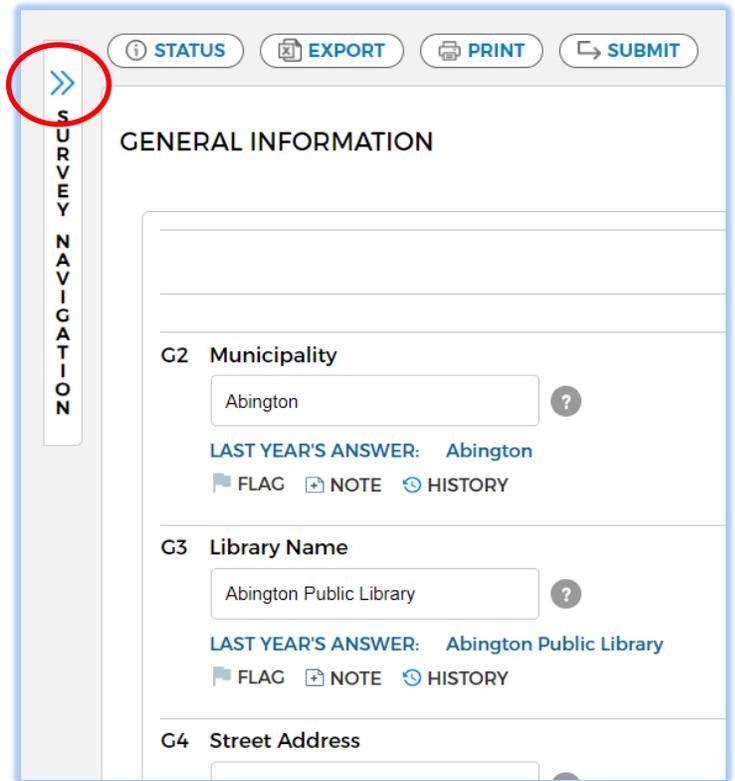
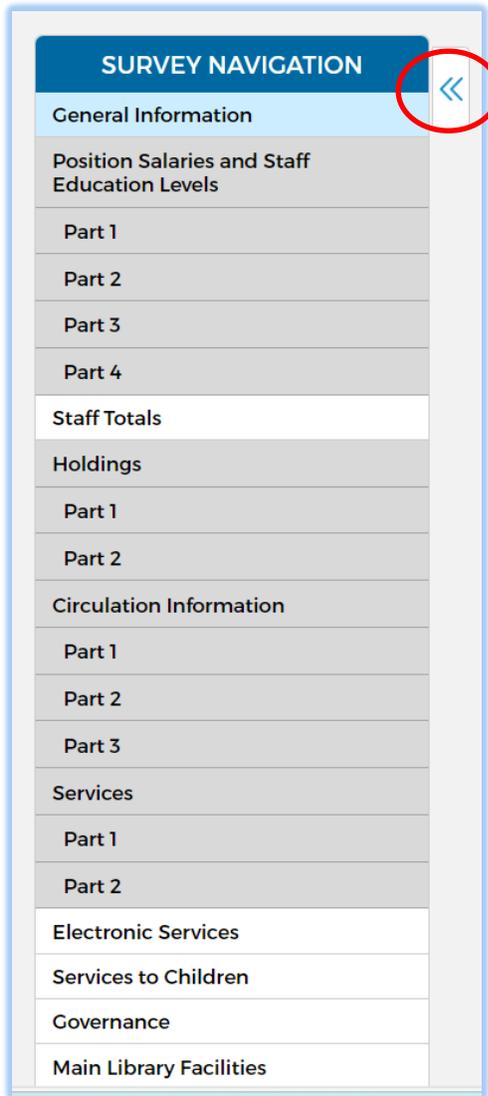
LAST YEAR'S ANSWER: 40,949

1) Population of legal service area should not be less than or equal to 0. Please explain why your data is outside of the normal range using the Federal note.

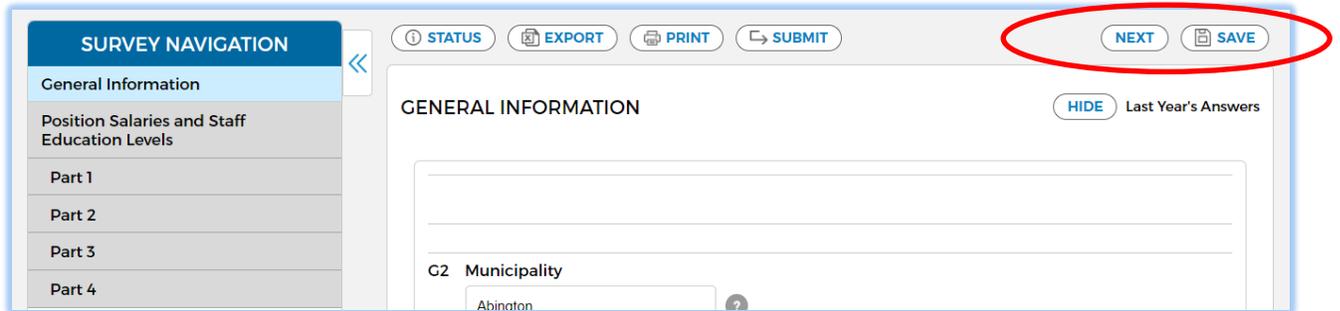
# Navigation

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

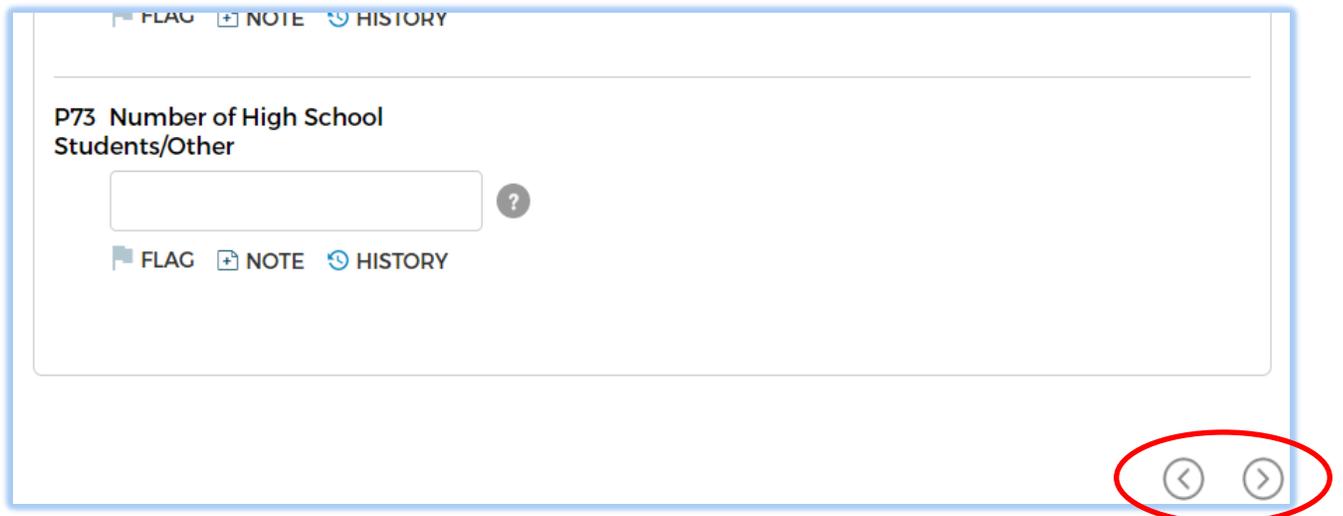
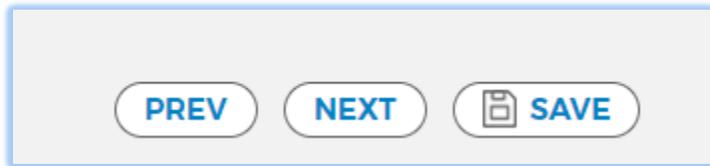
Note, you can collapse the Survey Navigation menu by clicking on the double arrow icon at the top right of the menu. When collapsed, click on the double arrows to expand the menu again.



Your progress through a survey is automatically saved as you enter data into a field and then tab or click into any other field. In addition, clicking **Next** or **Save** in the header area will save all updates.



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



From the Status page, 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.

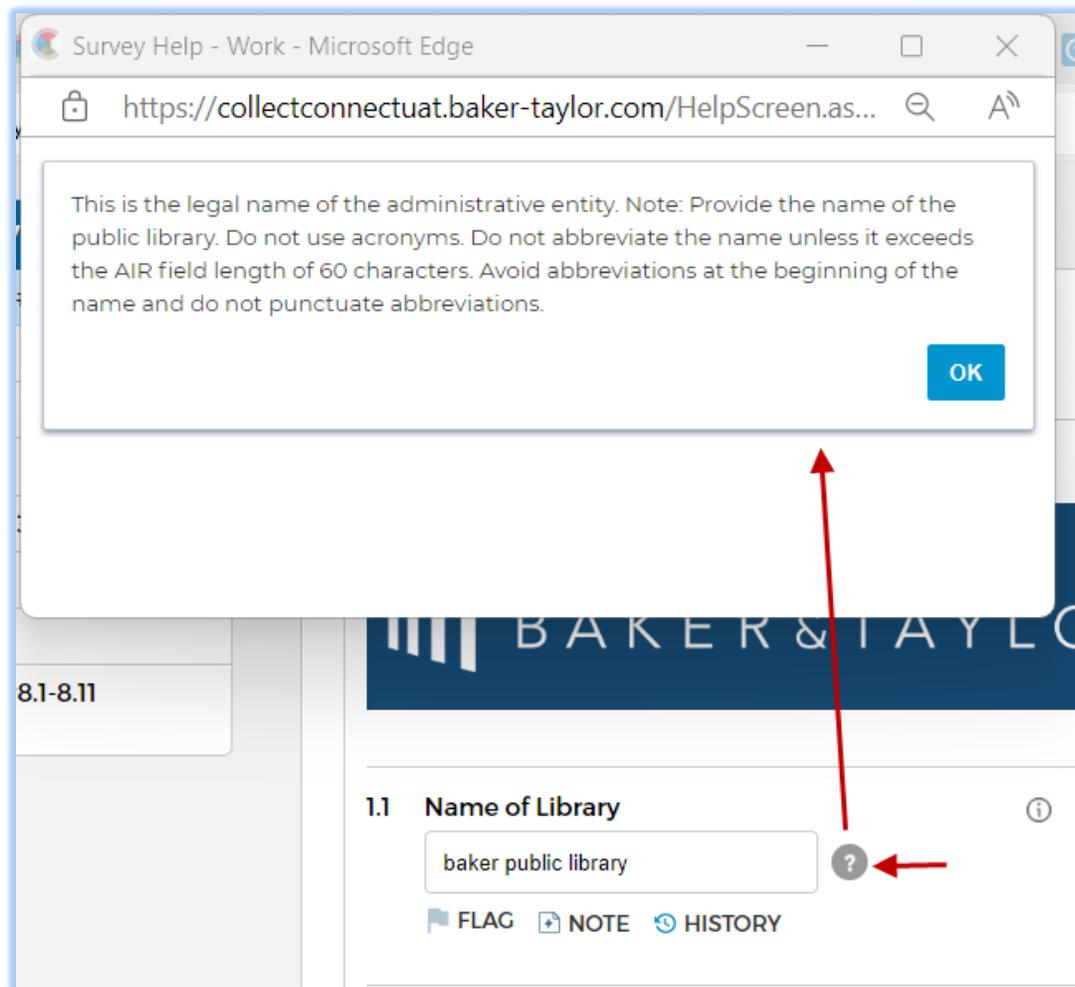
The screenshot shows the CollectConnect interface for Taylor Public Library. The top navigation bar includes 'RETURN TO MY SURVEY', 'SURVEY LIST', 'DASHBOARD', 'FAQ', 'INSTRUCTIONS', 'HELP', and 'CONTACT'. The 'RETURN TO MY SURVEY' button is highlighted with a red circle. Below the navigation bar, the page title is 'STATUS'. On the right side, there are buttons for 'PRINT', 'SUBMIT', and 'SAVE'. Below these are three status boxes: 'EDIT CHECKS (13)', 'UNANSWERED QUESTIONS (87)', and 'FLAGGED QUESTIONS (0)'. The main content area is titled 'EDIT CHECKS FOR REVIEW' and includes a 'HIDE' button and a link for 'LAST YEAR'S ANSWERS'. Under the heading 'GENERAL INFORMATION #1.1-1.17', there is a question '1.10 Population' with an input field and a help icon. A warning message is displayed: '1) Population of legal service area should not be less than or equal to 0. Please explain why your data is outside of the normal range using the Federal note.'

# Answering Questions

## Answer Fields

Simply enter your answer for each question in the provided data entry field. Some questions may require numeric answers, while others may require alphanumeric answers.

Guidance for answering questions can be accessed by clicking on the question mark icon  alongside data entry fields where it is displayed. Click on the **icon** to display the information in a pop-up.



When answering questions, you can also enter additional data to the survey.

- Flag a question for later review:

- Click the Flag icon
- The Flag icon will turn Red to indicate there is a follow up to do



- Enter a Note:

- Enter a Federal, State or Local note, according to your survey requirements
  - Multiple note types can be entered
- The Add Note icon will change to a pencil to indicate that there are notes
  -  NOTE 
- Save your note(s) by clicking the Save button below the note area, or by clicking again on the Note icon under the answer box
- To edit your note(s) click on the pencil icon

G104 Population of Legal Service Area

LAST YEAR'S ANSWER: 17,062

 FLAG  NOTE  HISTORY

FEDERAL STATE LOCAL PREVIOUS YEAR

Population of LSA has not yet been updated to new census]

 CLOSE  SAVE

G104 Population of Legal Service Area

LAST YEAR'S ANSWER: 17,062

 FLAG  NOTE  HISTORY

Collect will track data entry information as questions are answered. **Last Modified By** information identifying the person, date and time of the data entry can be accessed by clicking on the  icon that appears next to any data field with entered data.



1.1 Name of Library

 ?

When you are finished, click the icon again to exit and resume your survey.

## Locked Answer Fields

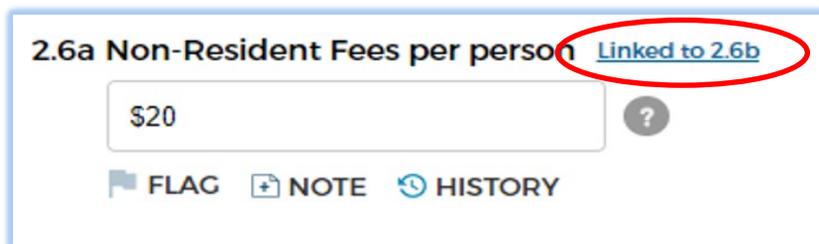
You cannot enter data into text fields that are grayed out. These fields have been locked by request by the SDC during survey setup. Data in these fields is typically pre-populated and cannot be modified. Fields that calculate a sum based on other input fields will also be grayed out.

Locked field – Calculation:



7.6 Total Number of Synchronous Program Sessions (7.1 + 7.2 + 7.3 + 7.4 + 7.5)

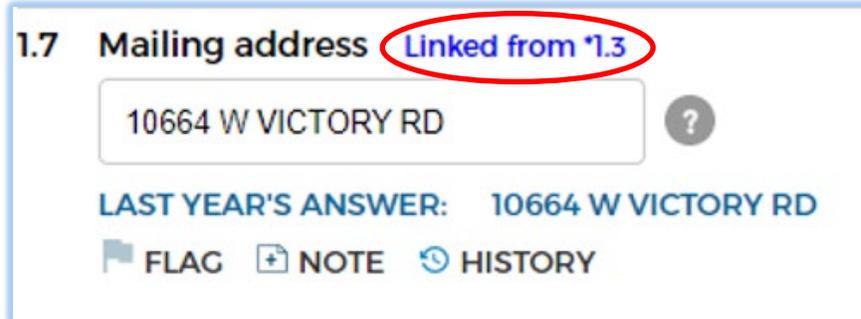
When data entered in one field will be mapped to another field in the survey, Collect will display the linked field question numbers. In the example below, data entered for question 2.6a will also populate the linked question 2.6b.



2.6a Non-Resident Fees per person [Linked to 2.6b](#)

 ?

When a question has been populated by data entered into a linked field, Collect will indicate the question number where the data has been mapped from. You can navigate to the linked question(s) by clicking on the link.



The screenshot shows a survey question interface. At the top, it says "1.7 Mailing address" followed by a blue link "Linked from \*1.3" which is circled in red. Below this is a text input field containing "10664 W VICTORY RD" and a question mark icon. Underneath the input field, it says "LAST YEAR'S ANSWER: 10664 W VICTORY RD". At the bottom, there are three icons: a flag icon labeled "FLAG", a plus icon labeled "NOTE", and a clock icon labeled "HISTORY".

## Flagging a Question

Click on the **Flag** icon  **FLAG** to mark a question for later review. The flag icon will turn red,  **FLAG** indicating that you've successfully flagged the question.

To remove the flag, click on the flag icon again. The flag will revert to gray, indicating that this question is not flagged.

Please note that applied flags will display to all users at your library and are meant to serve for answer reviews prior to survey submission.

## Enter a Note

Some edit checks will require you to enter additional information in a note. Click on the **Note** icon  **NOTE** to open the notes field. There are three types of notes that can be entered in their separate tabs: **Local**, **Federal**, and **State**, depending on your state's survey setup. See the Edit Check section for information about how notes are used to clarify data that triggers an edit check.

Information included in the edit check description will indicate which type of note is required.

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

1.16 PLSC Public Library Definition

?

LAST YEAR'S ANSWER: Y

FLAG NOTE HISTORY

FEDERAL STATE LOCAL PREVIOUS YEAR

This note will clear the error message

CLOSE SAVE

1) This entry differs from last year's entry. Please enter value as it was entered last year or explain in a Federal Note the reason for the change.  
(Annotated Federal)

## Save Your Note

Click **Save** to save the note. If you have not Saved your note, clicking **Close** will erase your note text and return you to the question.

## Repeating Groups

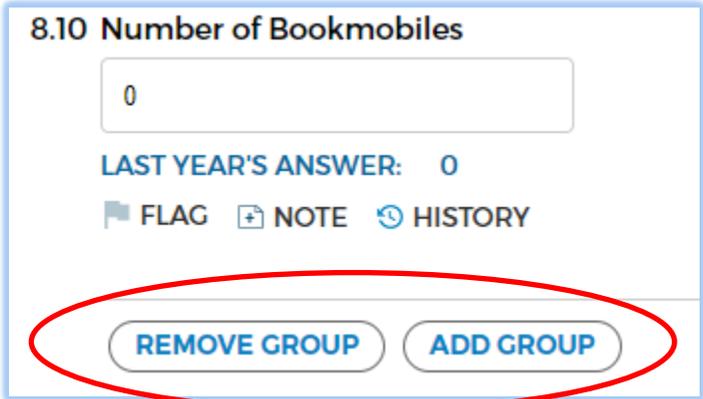
Repeating Groups are sets of questions used for reporting multiple instances of the same type of information. For example, repeating groups may be used to collect a standard array of answers about each of a library's branches, trustees, sources of income, contracting municipalities, and so on. You can add as many sets of repeating groups as needed.

Some surveys will not require any repeating groups.

To add a set of repeating group questions (for a new branch, as an example), click **Add Group**.

When you Add a Group, it will be inserted into the existing set of groups immediately following the group you were working in. That is, if you currently have three groups and are working in repeating group #2 and then click Add Group, the new group will be added in the third position and your former group #3 will become group #4, etc.

To remove an existing group, click **Remove Group** below the group you want to delete. The numbering of groups will be updated to account for the removal of a group.



8.10 Number of Bookmobiles

LAST YEAR'S ANSWER: 0

FLAG NOTE HISTORY

REMOVE GROUP ADD GROUP

The complete set of the questions required for each repeating group will be inserted below the current Group, as shown below.

### 8.10 Number of Bookmobiles

LAST YEAR'S ANSWER: 0

 FLAG  NOTE  HISTORY



### 8.1 FSCS\_SEQ

 FLAG  NOTE  HISTORY

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.

## Submit Your Survey

When you're ready to submit your survey, click the **Submit** button in the top of the page. The system will check your survey for any unanswered questions or unresolved errors.



If any errors or areas that need attention are found, they will be displayed on a following screen.

You should review all unanswered and flagged (optional) questions, resolve all edit checks, and print/save (optional) a copy of your survey before submitting. You must resolve any triggered 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.

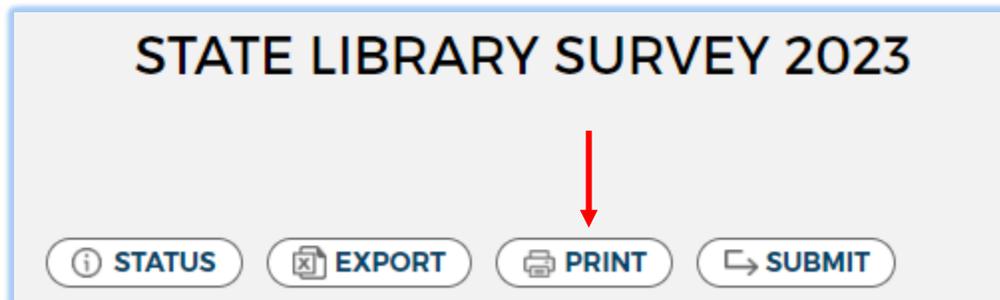
Click **Submit Survey** to formally submit your survey. You can submit your survey only after all edit checks have been successfully corrected.

## Print and Save

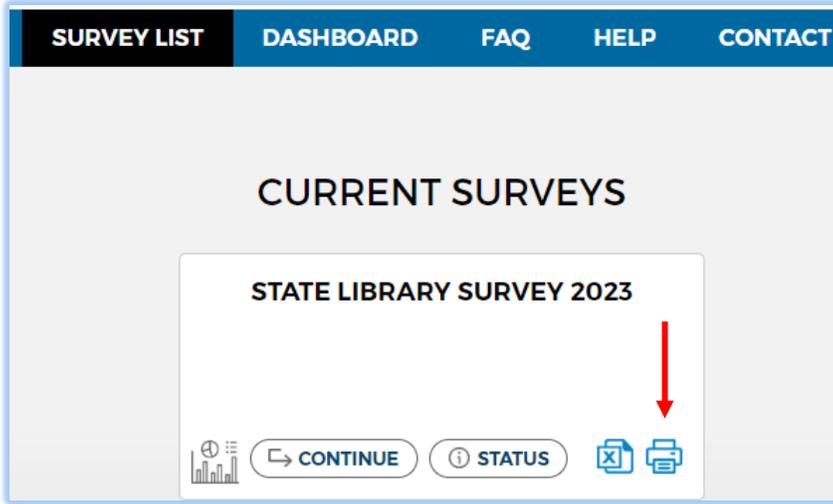
You may save and/or print a copy of your survey for your records at any time before submission. After submission, surveys are locked, and cannot be edited.

Submitted surveys may be printed or exported to Excel. There are print buttons within the survey and on the Current Surveys page.

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

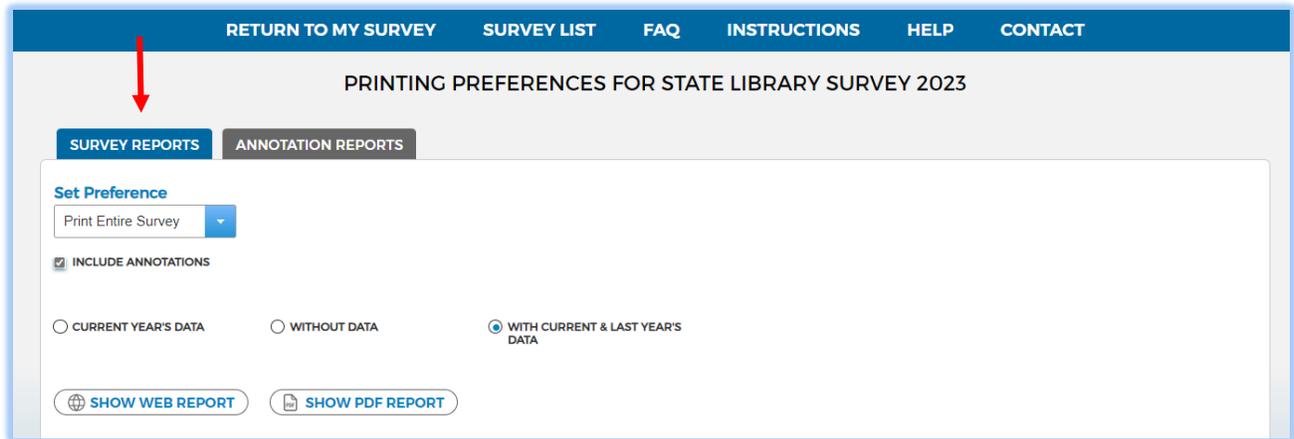


Click the **Print icon** next to the survey you want to print on the home page.



Upon clicking the Print icon a new printing preferences page will open for you to select your printing preferences. You can select **Survey Reports** or **Annotation Reports** via their separate tabs.

## 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 HTML and PDF versions of the report contain the same information, but the HTML version does not contain breaks between sections.

<b>Taylor Public Library State Library Survey 2023</b>			
		<b>CURRENT YEAR</b>	<b>PREVIOUS YEAR</b>
<b>General Information #1.1-1.17</b>			
Survey Due Date November 1, 2024			
1.1	Name of Library	Taylor Public Library	<i>Taylor Public Library</i>
1.2	Street Address	23 State Street	<i>23 State Street</i>
1.3	City	Taylorville	<i>Taylorville</i>
1.4	Zip Code	01237	<i>01237</i>
1.5	Mailing Address	23 State Street	<i>23 State Street</i>
1.6	Mailing Address City	Taylorville	<i>Taylorville</i>
1.7	Mailing Address Zip	01237	<i>01237</i>
1.8	County	Smyth	<i>Smyth</i>

# 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 individual sections. Only one individual section can be printed at a time.

The screenshot shows a web interface with two tabs: "SURVEY REPORTS" and "ANNOTATION REPORTS". The "ANNOTATION REPORTS" tab is active. Below the tabs, there are two sections:

- 1. Survey Notes:** Three checkboxes are present, all of which are checked: "FEDERAL NOTES", "STATE NOTES", and "LOCAL NOTES".
- 2. Survey Sections:** Two radio buttons are present. "ALL SECTIONS" is selected, and "SPECIFIC SECTION" is unselected.

At the bottom of the form, there are two buttons: "SHOW WEB REPORT" (with a globe icon) and "SHOW PDF REPORT" (with a PDF icon).

Select **Federal Notes**, **State Notes** and/or **Local 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.

This screenshot shows the "2. Survey Sections:" section of the interface. The "SPECIFIC SECTION" radio button is selected. A dropdown menu is open, displaying a list of sections:

- General Information #1.1-1.17 (selected)
- Personnel #2.1-2.5
- Collections #3.1-3.10
- Income #4.1-4.14
- Expenditures #5.1-5.13
- Services #6.1-6.15
- Programs #7.1-7.20
- Outlet Information #8.1-8.11

Below the dropdown, the "SHOW WEB REPORT" and "SHOW PDF REPORT" buttons are visible.

