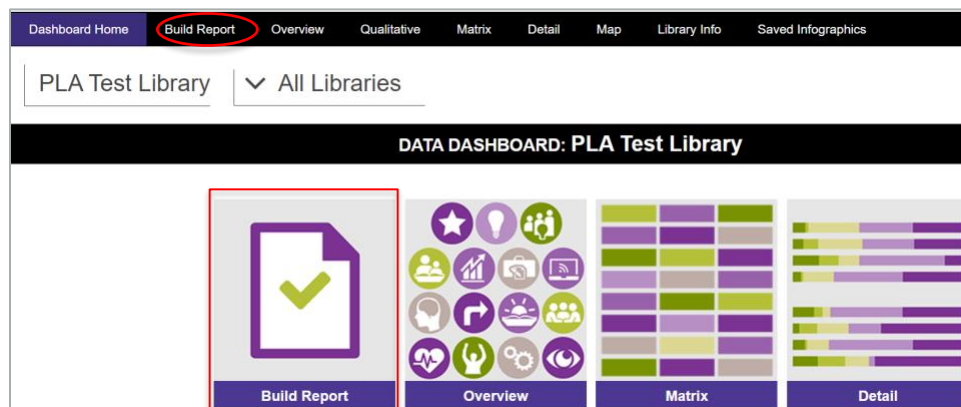


Building a Custom Report

You can build a custom report of your library's survey data through the report builder, located within the data dashboard.



The custom report is designed to allow you to select what survey data to include in the report by applying specific filters to your library's dataset. Filters include survey topic and type, program date or date range, program name, and survey name. These filters relate to the same information you entered when creating the survey.

In addition to applying custom filters, you can also apply light customization to your report by choosing to include a list of specific program details, adding a custom narrative, and adding a logo.

The custom report is formatted so that you can easily print, download, and share your survey results with stakeholders.

To build a custom report, you have two options to start the process. From the survey management tool, click the "Build a Report" button to open the report builder in a new tab. Or, from the data dashboard home page, click the "Build Report" button to launch the report builder.

The report builder will walk you through seven steps. Some of these steps are optional. There will be instructions on the screen for each step telling you if the information is required. There are also helpful screen-tips for each step, which you can hover over for a more detailed description of each question.

Step 1: Select Report Location

The first step is to select the report location, which is a required filter. If your library has more than one library or location, you can choose to select the option for all libraries, or choose a single library from the drop-down list. Any custom locations that you have entered in the system will appear in this list. It is not possible to choose more than one single location. If you are not sure which location was set for the surveys you want to choose, then you may want to select the option for all libraries at the top of the list. All location options will appear in the list regardless of whether there is any survey data for that location. For information about managing your library's locations, view tutorial on [accessing your library's account information](#).

The screenshot shows a form titled "WHO IS THE REPORT FOR?" with a help icon. Below the title is a note: "This is required for generating a report." The main label is "PLA Test Library". To the right is a dropdown menu currently showing "All Libraries". Below the dropdown is a search bar with a magnifying glass icon. A list of options is shown below the search bar, including "All Libraries", "PLA Library", "ALA Library", "ALA Office", "Custom Location", "EXAMPLE LOCATION", "Extension", "Facebook Live", and "Grvffindor Library".

After selecting the location, click the arrow on the right side of the screen to continue.

Step 2: Select Topic

The second step is to select the survey topic and type. Both of these filters are required.

Select the survey topic from the list. Then choose whether you are generating a report for your immediate or follow-up surveys. You can only select a single topic and single type for one report.

The screenshot shows a form titled "SELECT ONE TOPIC FOR PLA TEST LIBRARY" with a help icon. Below the title is a note: "This is required for generating a report." There is a dropdown menu showing "Health". Below this is a section titled "IS YOUR REPORT FOR HEALTH IMMEDIATE OR FOLLOW-UP?" with a help icon. Below this title is a note: "This is required for generating a report." There are two radio buttons: "Immediate" (which is selected) and "Follow-up". At the bottom of the form, it says "Selected criteria: PLA Test Library, Health, Immediate". There are left and right navigation arrows on the sides of the form.

You will see that your selections appear at the bottom of the report builder navigation window.

Once you have selected the survey topic and type, you can proceed to the next step.

Step 3: Select Date Range and/or Program(s)

The third step is to select a program date or date range to filter the data, as well as to choose a program name or multiple program names. Both of these filters are optional.

The date or date range corresponds to the program date entered [when creating the survey](#). If you would like to limit the report

by program date, then choose a date or date range using the calendar tool.

The screenshot shows a two-panel interface for Step 3. The left panel is titled 'OPTIONAL: SELECT DATE(S)' and contains a date range selector with the placeholder 'mm/dd/yyyy to mm/dd/yyyy' and a dropdown arrow. The right panel is titled 'OPTIONAL: SELECT PROGRAM(S)' and contains a text input field with a dropdown arrow, and below it, the links 'Select All' and 'Select None'. At the bottom of the interface, there is a checkbox labeled 'Include full program list in the report' which is checked, and the text 'Selected criteria: PLA Test Library, Health, Immediate'. To the right of this is a purple button labeled 'SKIP TO PREVIEW'. Navigation arrows (left and right) are located on the sides of the panels.

The program name refers to the program name you entered during Step 2 of [the survey creation process](#). To enter a program name, click the field or begin typing the name of the program and a list of options will appear showing program names from your chosen survey topic and type. Simply click the name of the program to add it as a selection. You have the option to select multiple program names. This filter will roll up data from all surveys with the selected program name, so if you ran multiple surveys using the same program name you could select all of those results using this filter.

Also included in this step is an option to include a full program list in the final summary report. This would list each program that was surveyed, including the program name, survey name, attendance, and response rate for that survey. This box will be checked by default. If you do not wish to include the program list in the report, click to uncheck this option.

When you have finished step 3, click the arrow to move on to the next step. If you have no further customizations, you can skip straight to the last step to preview the report.

Step 4: Select Survey(s)

Step four is to select a survey or multiple surveys. This filter allows you to choose the specific instances of each survey you have run in the system.

In order to use this filter, you need to have chosen at least one program in the previous step. You will see the filters already chosen in the area at the bottom of the report builder navigation window.

If you need to return to the previous step, click the left arrow in the report builder navigation window.

To select a survey, click the field to see a list of surveys that are connected to the program names chosen in the previous step. The drop-down list is organized by survey name, which corresponds to the survey name field in Step 3 of the survey creation process. Survey names are unique and represent a single survey. You can choose one or multiple surveys in this step. Only surveys that have response data entered will appear in this list. Click the name of the surveys you wish to include to add them to the report.

If you wish to include all surveys that meet the existing filters chosen in previous steps, then you can skip this step and leave this field blank.

When you have finished with step 4, click the arrow to move on to the next step. If you have no further customizations, you can skip straight to the last step to preview the report.

OPTIONAL: SELECT SURVEY(S) ?

Health - 04/01/2019
Health Research at the Library - 05/01/2019
Health Research at the Library - 05/31/2019
Mobile Kitchen - 11/01/0019
NNLM All of Us Research II - 05/15/2019
Taking Care of You - 07/31/2019

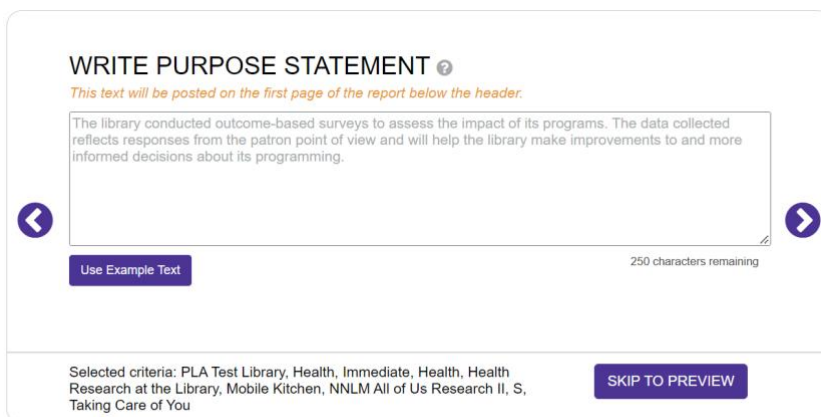
Selected criteria: PLA Test Library, Health, Immediate, Health, Health Research at the Library, Mobile Kitchen, NNLM All of Us Research II, Taking Care of You, Programs 01/06/2023 to 01/13/2023 Responses 01/06/2023 to 01/13/2023

[SKIP TO PREVIEW](#)

Step 5: Write Custom Narrative

Step 5 is where you can add in a short custom narrative called the purpose statement, which is optional. The purpose statement will appear at the beginning of the report and is where you can include any specific information about your library's intent or process for measuring outcomes.

If you wish to include a purpose statement, simply type it into the field. There is some example text included, which you can insert and modify by clicking the button below labeled "Use Example Text." The purpose statement is limited to 250 characters.



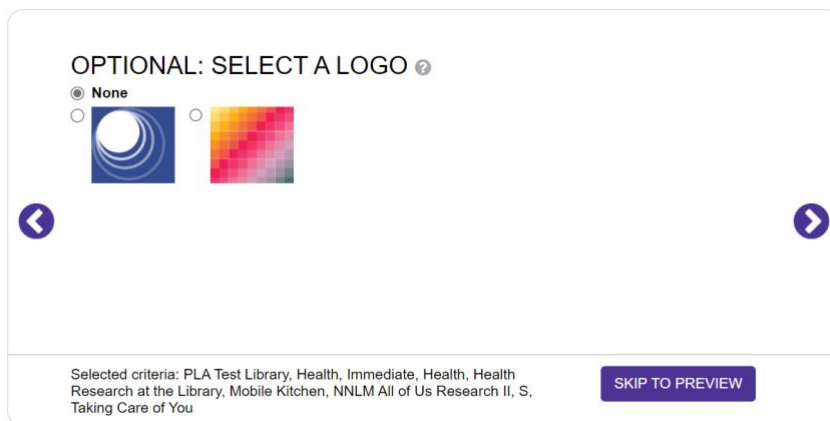
The screenshot shows a form titled "WRITE PURPOSE STATEMENT" with a help icon. Below the title is a note: "This text will be posted on the first page of the report below the header." There is a text input field containing example text: "The library conducted outcome-based surveys to assess the impact of its programs. The data collected reflects responses from the patron point of view and will help the library make improvements to and more informed decisions about its programming." To the left of the field is a left arrow, and to the right is a right arrow. Below the field is a button labeled "Use Example Text" and a character count "250 characters remaining". At the bottom of the form, it says "Selected criteria: PLA Test Library, Health, Immediate, Health, Health Research at the Library, Mobile Kitchen, NNLM All of Us Research II, S, Taking Care of You" and has a "SKIP TO PREVIEW" button.

Step 6: Select Logo

Once you have entered your purpose statement, click to move on to the next step.

Step 6 allows you to include a logo, and is optional. The default will be to not include a logo. However, you can select from any of the logos you have previously uploaded to the system to include on your surveys ([for information on adding logos, see this tutorial](#)). The logo will appear at the end of the report.

If you would like to include a logo, click the radio button next to the logo you would like to include, and click the navigation arrow to continue.



The screenshot shows a form titled "OPTIONAL: SELECT A LOGO" with a help icon. There are two radio buttons: "None" (selected) and a logo image. Below the radio buttons are two logo images: a blue circular logo and a red and yellow pixelated logo. To the left of the form is a left arrow, and to the right is a right arrow. At the bottom of the form, it says "Selected criteria: PLA Test Library, Health, Immediate, Health, Health Research at the Library, Mobile Kitchen, NNLM All of Us Research II, S, Taking Care of You" and has a "SKIP TO PREVIEW" button.

Step 7: Preview

The final step is where you can preview the report. You will also see all of the criteria that you used to build the report.

Before you preview the report, you can choose to add relevant open-ended responses to the report or export open-ended responses as an XLS file.

PREVIEW YOUR REPORT

Selected Criteria:

Student Test Library

Instruction

Immediate

Test

◀

▶

◀

▶

☒ Include full program list in the report

Add or Export Open-Ended Responses

Preview Report

To add or export open-ended responses that correspond to the report, click the button to “Add or Export.” A pop-up will appear showing a list of questions and responses, along with corresponding survey data. These responses will already have the same filters applied as what you have selected for the summary report. You can choose to apply further filters if you wish to narrow your selections.

Open Response View & Export

Add Selected to ReportAdd All to ReportExport all to ExcelExport selected to Excel

Search:

(Press ctrl or shift while clicking to select multiple rows for export)

Previous

12345...8Next

Date	Survey	Question	Topic Health	Type Immediate	Status	Sentiment	Response
11/1/0019	Mobile Kitchen - 11/01/0019	What did you like most about the program?	Health	Immediate	Active	Very Positive	fun
11/1/0019	Mobile Kitchen - 11/01/0019	What could the library do to better assist you in learning more about being healthy?	Health	Immediate	Active	More Negative	idk
4/1/2019	Health - 04/01/2019	What did you like most about the program?	Health	Immediate	Active	Very Positive	test
4/1/2019	Health - 04/01/2019	What could the library do to better assist you in learning more about being healthy?	Health	Immediate	Active	Very Positive	test
4/1/2019	Health - 04/01/2019	What did you like most about the program?	Health	Immediate	Active	Neutral	
4/1/2019	Health - 04/01/2019	What could the library do to better assist you in learning more about being healthy?	Health	Immediate	Active	Neutral	
5/1/2019	Health Research at the Library - 05/01/2019	What did you like most about the program?	Health	Immediate	Active	Very Positive	Learning about new health tips

You have the choice to select all the responses shown, or only some of the responses. You can choose to select only a few responses that best highlight the patron feedback the library received. Keep in mind that the more responses you include, the longer the report will be.

Once you are happy with the responses you have chosen, click the appropriate button to either export the responses to an Excel file or add them to the summary report.


The process for exporting open-ended responses from the data dashboard tools is covered in more detail in [another tutorial](#).

Preview Your Report

Click the button to preview your report and the preview will open in a pop-up. You can view each page of the report by clicking the arrows in the upper right corner to go forward or backward. Most reports will be a minimum of three pages long.

PREVIEW YOUR REPORT

Selected criteria:
PLA Test Library, Health, Immediate, Health, Health Research at the Library, Mobile Kitchen, NNLM All of Us Research II, S, Taking Care of You

**PLA Test Library**
Survey Results and Community Implications

REPORT INFORMATION


Topic: Health
Programs: See full list on page 2
Date Range: None


PLA TEST LIBRARY SURVEY WORK


PLA Test Library staff distributed surveys to program participants to collect data and insights about how their health services and programs are supporting community needs. PLA Test Library surveyed patrons using the Project Outcome Health Survey, which measures the impact of services designed to improve the health of patrons and their families. A total of 26 survey responses were collected.


Results

A total of 26 survey responses were collected. Of the percentage of patrons surveyed who either **agreed** or **strongly agreed** that they benefited from the service or program:

**89%** felt more knowledgeable about the health topic presented






**69%** intend to apply what they learned to adopt or maintain a healthier lifestyle

**76%** felt more confident about taking care of their or their family's health

**77%** were more aware of health-related resources and services provided by the library

The full results of the survey(s) are shown below. (Note that due to rounding, percentages may not add up to 100%)

	Strongly Disagree	Disagree	Neither	Agree	Strongly Agree
Knowledge			27%		62%
Confidence	8%	15%		38%	38%
Application / New Skills		23%		42%	27%
Awareness of Resources	8%	15%		50%	27%

SCORING:  Strongly Disagree  Disagree  Neither  Agree  Strongly Agree

Selected Criteria Average

	Library
Knowledge	4.4
Confidence	4.1
Application / New Skills	4.0
Awareness of Resources	3.9

Health Topic Averages

	Library	Peer	State/Province	National	Total
Knowledge	4.3	0.0	4.3	4.5	4.5
Confidence	4.0	0.0	4.0	4.4	4.4
Application / New Skills	3.9	0.0	3.9	4.5	4.5
Awareness of Resources	3.8	0.0	3.8	4.4	4.3

AVERAGES: Ranges from 1.0 (Strongly Disagree) to 5.0 (Strongly Agree)

01/03

This is a preview of your report based on the criteria selected.

If something looks incorrect, you may go back and edit.

[Edit Report Criteria](#)

If all looks good, hit confirm and you will be able to print your report. Once confirmed, your criteria for this specific report will be saved for a future run.

[Confirm & Print](#)

To save report as PDF, please click the Print button and select "Microsoft Print to PDF" or "Save as PDF" as your printer. Click on the button below for more details.

[PDF & Printing Instructions](#)

Custom Pages

Add and remove new pages to your report.

[+ Before](#) [+ After](#)

Custom Content

Add previously saved content or custom text to new pages of your report.

[+ Content](#) [+ Text](#)

If you would like to make changes to your filters or your customization options before printing or saving the report, click the button to “Edit Report Criteria” to go back to make adjustments.

Add Custom Content

At the bottom right of the report preview page are options to add custom pages and custom content. First, add a custom page by clicking the “+ Before” or “+ After” button to add the new page before or after the page you are currently viewing.

Custom Pages

Add and remove new pages to your report.

[+ Before](#) [+ After](#)

Custom Content

Add previously saved content or custom text to new pages of your report.

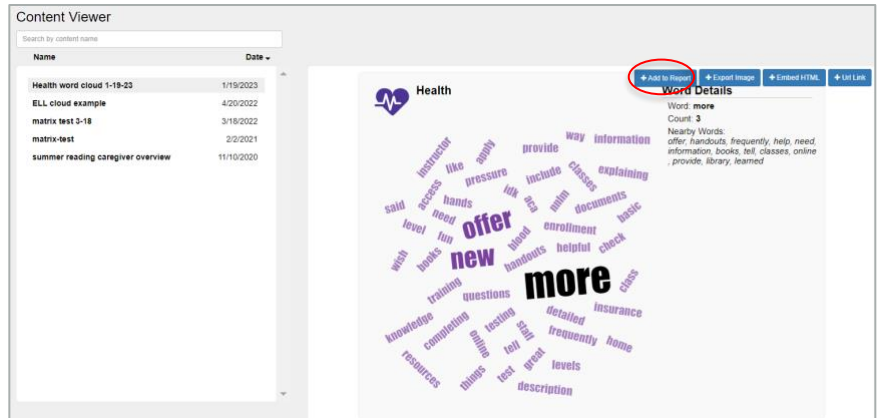
[+ Content](#) [+ Text](#)

Updated: February 2023

Building a Custom Report

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Once you have added a new page, you can add previously saved content or text to the new pages of your report. To add content, click on the “+ Content” button. You will be able to choose from visualizations you saved from the data dashboards. Once your selection is made, click on the “Add to Report” button.



To add custom text to your report, click on the “+ Text” button. This will bring up a text box. You can put the text anywhere on the new content page and change font size, format, and color.

Save or Print Your Report

To print a paper copy of the report, click the “Confirm & Print” button to the right of the report and follow the prompts on your screen to select a printer and complete the print job.

You can also choose to save the report to your local computer as a PDF, so you can access it later or send it as an email attachment. To save the report as a PDF, you will still use your computer’s printer function. Click the “Print” button and then select the correct option to “Save” the file as a PDF. Then select the location to save the file.

The details of what is included in Project Outcome reports is covered in [another tutorial](#).

