

# PCCLD Dashboard

2018

USE, MAINTENANCE, AND UPDATE ROUTINES

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## List of Revisions

Date	Revision	Author/Editor	Comments
11/30/2016	1.0	David Hayden	Original Release
12/12/16	1.1	David Hayden	Removed three warning message steps and graphics on pages 7-9. ( previous figs 19,20 &29)
4/18/17	1.2	David Hayden	- Added information to “Manually refresh data . . .” to clarify the type of Evanced report to use (step 3).

			<ul style="list-style-type: none"> <li>- Renamed section to "Manually refresh data <b>and create new newsletter files.</b>"</li> </ul>
4/24/17	1.3	David Hayden	Replaced O:\1-Data Analysis with O:\Data Analysis to reflect directory changes by IT.
6/20/17	1.4	David Hayden	Added section on searching for a program.
7/24/18	1.5	David Hayden	<ul style="list-style-type: none"> <li>- Added sections to explain use of Meeting Room and Presenter Data Buttons.</li> <li>- Updated the section on refreshing data to reflect changes to Demco and for Meeting Room data export.</li> </ul>
9/10/18	1.6	David Hayden	Updated notes about generating Meeting Room use spreadsheet. Reformatted graphics to keep document size at 10 pages.

## Introduction

To make key data and operational metrics more accessible to library managers and staff a dashboard was created enabling you to quickly visualize program attendance and meeting room data. As of this writing more features are planned and will be added to this dashboard or as additional dashboards.

The dashboard is not automatic per se' and requires some maintenance to keep the data current. Updates to the data feeding the dashboard typically occur every Monday but by following the instructions listed herein ([page 6](#)) anyone should be able to update the data at any time. The steps are simple but do take about 5 minutes.

**NOTE:** The data feeding the dashboard comes from Demco Signup & Spaces and is only as accurate as the data entered into that system.

## Using the Dashboard

### Overview

1. In file manager find the **O: drive**
2. Select the **Data Analysis** folder
3. Open the Excel file **PCCLD\_Dashboard.xlsx**. **Note:** this file contains some visual basic programming so you may get a warning asking if you want to enable macros or you may see a yellow band at the top of the file where you can click to enable macros. Yes, you do want to enable macros in this file.
4. Click on the refresh button (**Figure 1**) to refresh data used by this dashboard. **Note:** The source data is updated on Mondays. If you use the dashboard Tuesday-Sunday, chances are you may not need to refresh the data but it only takes about 30 seconds to do so. If you need more current data, instructions for loading the most recent data start on [page 6](#).
5. Select the criteria for your report by clicking on various options from the five menus. You can click on a single item, drag the mouse to select a range of items or, using the ctrl key, you can pick any combination you need.
6. View your results on the eight graphs provided. The eight graphs (**Figure 2**) visually show :
  - a. Data entry errors by library
  - b. Events w/o attendance by library for selected criteria
  - c. Total number of events and attendance by month for selected criteria
  - d. Number of events and attendance for selected criteria by library
  - e. Total events and attendance for selected criteria.
  - f. Comparison by year for selected criteria
  - g. Number of events by topic (*Event Type Option 1*) for selected criteria
  - h. Attendance by topic (*Event Type Option 1*) for selected criteria



**FIGURE 1**



FIGURE 2

## Criteria selection details

Changing criteria for your report is simple and very flexible. For example, if you want to see all data for your branch, just click on your branch name. In the left example below (Figure 3), only the Barkman Library is selected and only data specific to that branch will be displayed.

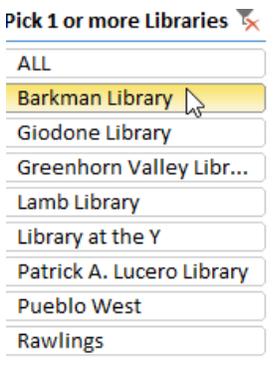


FIGURE 4

You can just as easily, click on one branch and while holding the mouse button down, drag the mouse to select more than one library as shown on the right (Figure 4).

All basic Microsoft mouse functions apply. You can click and drag, use the control (Ctrl) key with the mouse to pick non-contiguous items, or use the Shift key with the mouse to select a range of items.

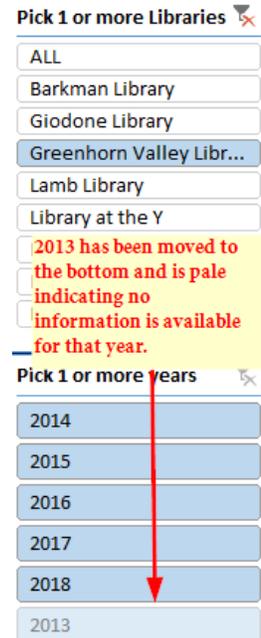
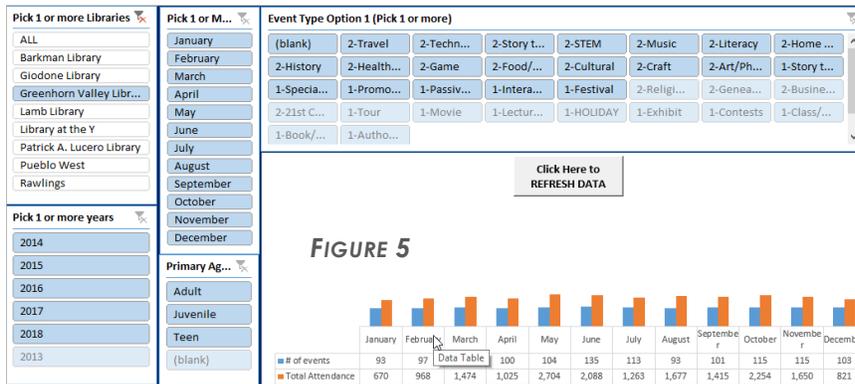


FIGURE 3

As you change your criteria, not only do the charts update automatically, but the display for other criteria changes dynamically as well. In the example shown on the right (**Figure 5**), Greenhorn Valley Library has been selected and the year 2013 moved to the bottom of the “Year” selection field and turned pale. This indicates that there is no available data for Greenhorn Valley Library for 2013.

These functions apply to all selectable criteria (**Figure 6**). You can choose any combination of:

- Library
- Year
- Month
- Primary Age Group
- Event Type Option 1



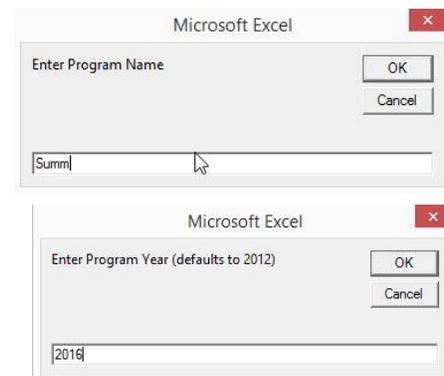
To reset any filter, Click on the funnel button .



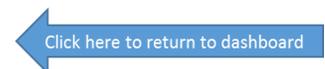
### Finding information about a specific program

To find information about a specific program:

1. Click on this button. [Search for a Program](#)
2. Enter at least three characters of the program name and click on OK. The more characters you add, the more you can refine your results.
3. Enter the first year to begin searching and click OK. If you enter 2012, the results will include all data from 2012 through the current year. If you only enter the current year, the results will be for the current year only.
4. Review your results. A worksheet will open displaying the results for your search criteria along with some summary information. (See next page.)
5. Click on the search button to find another program or refine your search.
6. When finished, click on arrow to return to main dashboard.



[Search for another program](#)



Program Name	Attendance	Month	Year	Branch
EPIC Summit	125	April	2016	Rawlings
Spring into Summer!		May	2016	Rawlings
Summer Reading Visit - Carlisle Elementary	335	May	2016	Rawlings
North Mesa Summer Reading Announcement	409	May	2016	Rawlings
Spring into Summer!	20	May	2016	Rawlings
Summer Reading Promotional Visit - Liberty Point In	76	May	2016	Rawlings
Summer Reading Promotional Visit - Skyview Middle	64	May	2016	Pueblo West
Belmont Summer Reading Program	475	May	2016	Pueblo West
Vineland Elementary Summer Reading Announcement	285	May	2016	Giodone Library
Summer Reading Promotion Event at Rye Elementary	237	May	2016	Greenhorn Valley Library
Spring into Summer!	15	May	2016	Greenhorn Valley Library
Spring into Summer!	12	May	2016	Greenhorn Valley Library
Summer Reading Prize Room	-	June	2016	Pueblo West
Summer Reading Movies: The Sandlot (PG)	10	June	2016	Rawlings
Summer Reading Movies: The Sandlot (PG)	5	June	2016	Rawlings
Summer Reading Kick-off	30	June	2016	Patrick A. Lucero Library
Summer Reading Kick off	112	June	2016	Giodone Library
Summer Reading Kickoff Concert featuring Blue Pepp	170	June	2016	Rawlings
Summer Reading Program Kickoff	19	June	2016	Barkman Library
Summer Reading Prize Room	-	June	2016	Pueblo West
Summer Reading Movies: Chicken Little (G)	23	June	2016	Rawlings

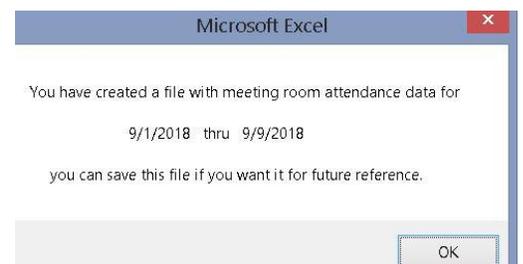
  

Sum of Attendance	Column	2016	2017	Grand Total
Barkman Library		494	1706	2200
Giodone Library		806	2616	3422
Greenhorn Valley Library		364	147	511
Lamb Library		80	80	80
Patrick A. Lucero Library		30	400	430
Pueblo West		1282	900	2182
Rawlings		8643	1599	10242
<b>Grand Total</b>		<b>11619</b>	<b>7448</b>	<b>19067</b>

### Listing meeting rooms uses that need attendance information added

To find meeting room information:

1. Click on this button. **Used Meeting Rooms w/o Attendance**
2. Click OK to continue or Cancel to return to dashboard. This prompt also allows you to enter an alternate drive in the event you have the data stored locally or on a thumb drive.
3. Wait a few seconds and review your results. A worksheet will open displaying meeting room uses that do not have any attendance information. **NOTE:** this information comes from an output file named ReservationReport.xlsx. This file is exported from Demco Spaces using a report Named "Room Usage (DSH)." When running this report a date range is selected; typically from the first of the current month up to but not including the current date. (see page 10)
4. After a few seconds you will see the prompt shown to the right telling you a new file has been created and you can save this file for personal use. When you click OK, the new file will open for you to use.
5. When finished, close the Meeting Room Data file to return to main dashboard.

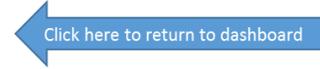


### Finding programs based on information in the Presenter field

To find presenter based information:

1. Click on this button. **Presenter Data**
2. When prompted, enter presenter information you want to retrieve. It could be a department acronym, a person's name, a branch acronym, or any other information that is in the presenter field.

3. Enter a program year to be searched.
4. Review your results. You can click this button to run another search.
5. When finished, click on arrow to return to main dashboard.



## Dashboard usage notes

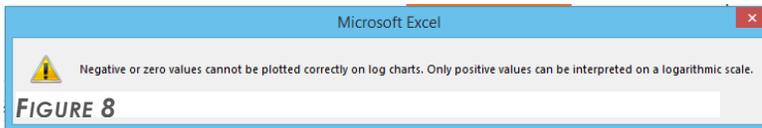
### Warning and error messages

A couple warning and or error messages pop up when using the dashboard, they can be ignored. Below is a list of the messages you might see.

1. Reference is not valid (**Figure 7**). This message occurs upon opening the dashboard and can be ignored. Click on OK.
2. Negative or 0 values cannot be plotted correctly on log charts. Only positive values can be interpreted correctly on a logarithmic scale. (**Figure 8**). Click on OK.



**FIGURE 7**



**FIGURE 8**

3. When you first open the dashboard, you may get a warning that the file uses macros and may be unsafe. Click on the button to enable macros.

If someone else has the file open, you may get a warning that someone else is using the file. Click on the option to open the file as Read Only. This will not affect the function of the dashboard, but will not allow you to save changes, which you shouldn't do anyway.

In Read Only mode, when you click on the button to refresh the data, it will try to save the updates and you might get an error that the file could not be saved. This is ok because the data will be current, you just won't be able to save it.

### Dashboard graphs or other objects get moved out of location.

In order for the graphs and selectors to work properly they need to be "unlocked." It is pretty easy to unintentionally move the graphs or other objects out of location. You can quickly return all of the dashboard objects to their original locations by clicking on the "Realign Dashboard Objects" button (**Figure 9**).



**FIGURE 9**

## Manually refresh the data and create new newsletter files.

Unfortunately Demco does not have a feature to enable automatic scheduled reporting. As a result, a few simple steps need to be taken to refresh the data. The Data Analyst should refresh the data every Monday morning, but in the event you want more current data, you can do a manual refresh.

Refreshing the dashboard data involves several steps. The steps are not difficult or time consuming but take about 5 minutes to complete. You will need familiarity with Demco, Excel and Access.

### Requirements for refreshing the dashboard data

To refresh the dashboard data you must have:

- Access to Demco Signup and Spaces
- The permission to create a reports in Signup and Spaces
- Microsoft Excel
- Microsoft Access

### Dashboard data refresh steps

1. Log into Demco
2. Select Signup,
3. Select Run Report (**Figure 10**).
4. Select Event Report (**Figure 11**).
5. After picking Static Date, select an appropriate date range beginning with Jan 1 of the current year and extending through Dec 31 of a future year. (**Figure 12**).
6. Do not apply any filters. All items should be checked.
7. Include the following fields in the report in this order:
  - a. Title
  - b. Start Date
  - c. Start Time
  - d. End Time
  - e. Location
  - f. Space
  - g. Primary Event Type
  - h. Primary Age Group
  - i. Last Modified
  - j. Description
  - k. Presenter
  - l. Registration Required

FIGURE 10

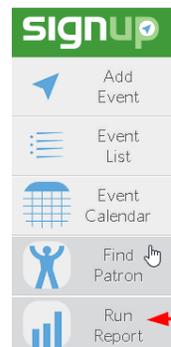


FIGURE 11

Create New Report

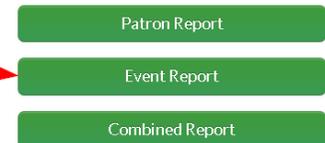


FIGURE 12



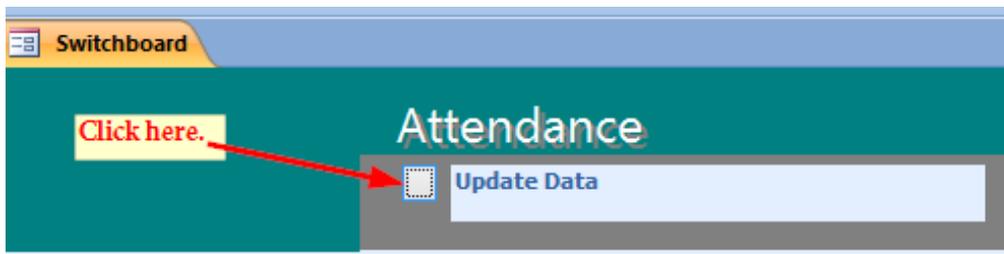
8. Click on Run Report. 
9. After a couple minutes the report will be complete and displayed on the screen.
10. Click on Export, then select Excel (**Figure 13**).



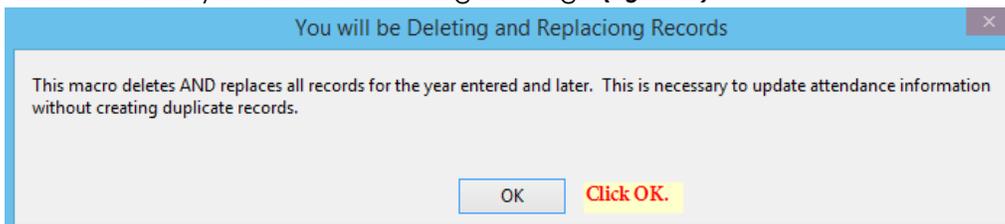
11. After a minute or so, the downloaded file will appear as a link in your browser. (or you can find it in your default download directory)
12. Click on link to open file.
13. You will get a warning saying that the format does not match (**Figure 14**). That's ok, just click Yes.



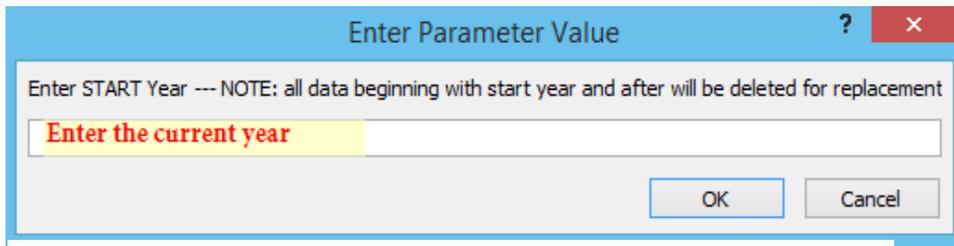
14. Save the file as: **O:\Data Analysis\EventReport.xlsx**
15. Close the file.
16. Open **O:\Data Analysis\Program Attendance Analysis.accdb** in MS Access. **Note**, the file name does not use the correct spelling "attendance".
17. After the file opens in Access, Click on Update Data button (**Figure 15**).



18. Click OK when you see the following message (**Figure 16**).



19. When prompted, enter the current year (**Figure 17**).

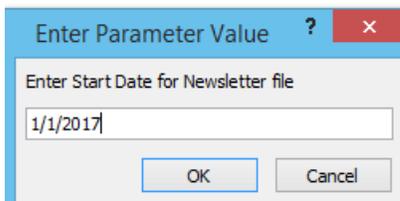


**FIGURE 17**

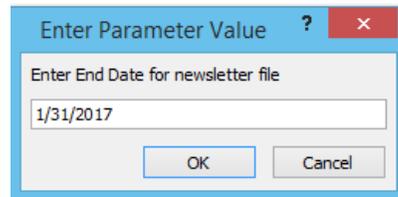
20. You will now be prompted for newsletter file dates. The newsletter dates are for future newsletter submissions. For example, if you are running the program in late November or early December the newsletter submissions would be for January of the following year.

As of this writing it is late November 2016 so the newsletter dates would be for 1-1-2017 through 1-31-2017. See example (**Figures 18 & 19**).

Alternatively, when you run the program in late January or early February, your dates would be March 1 of the current year through March 31 of the current year, and so on.

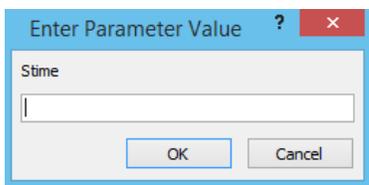


**FIGURE 19**

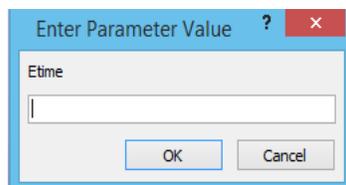


**FIGURE 18**

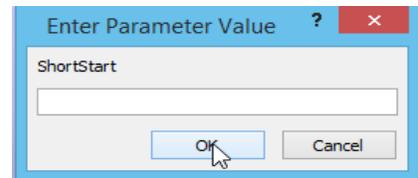
21. You will now get 6 prompts to enter a parameter value. Just ignore them by clicking OK on all of them (**Figures 20 - 25**).



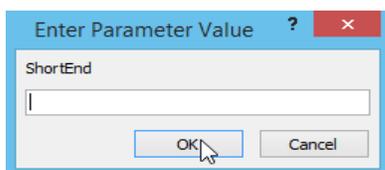
**FIGURE 24**



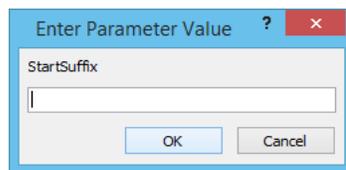
**FIGURE 25**



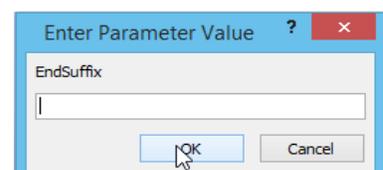
**FIGURE 23**



**FIGURE 22**



**FIGURE 21**



**FIGURE 20**

22. Click OK when you see the following message (**Figure 26**).



**FIGURE 26**

Congratulations. You have just refreshed the data for the dashboard. All you have to do now is open the dashboard and click on the "Refresh Data" button (**Figure 27**).



**FIGURE 27**

### Updating meeting room data

If you need current meeting room data complete the following steps:

1. Log in to Demco
2. Click on Spaces
3. Click on Run Report
4. Select Reservation Report
5. Select Static Date and enter the first day of the current month for the start date. For the end date use the current date minus 1. For example if you are running the report on the 25<sup>TH</sup> you would enter the 24<sup>TH</sup>.
6. Make sure all locations are selected.
7. Include the following fields in this order.
  - a. Reservation Date
  - b. Start Time
  - c. Space Name
  - d. Attendance
  - e. Patron Name
  - f. Organization
  - g. Internal notes.
8. Click on Run Report.
9. After the report is displayed on the screen and complete, Click on Export.
10. Click on CSV.
11. After the file downloads, open the file.
12. Save the file as O:\Data Analysis\ReservationReport.xlsx. **Note:** you will be saving the file as an Excel xlsx format.
13. Open the PCCLD Dashboard and click on this button **Used Meeting Rooms w/o Attendance** to get the most current list of meeting rooms that need attendance added.