

Guidance for the PLS FY 2016 Data Collection: Import File and Edit Check Specifications

Date: August 31, 2016

To: Institute of Museum and Library Services (IMLS) and State Data Coordinators (SDCs)

From: American Institutes for Research (AIR)

To help you and your libraries prepare for the PLS FY 2016 data collection in early 2017, this memo

1. provides information on import file specifications document,
2. provides information on the edit check specifications,
3. lists revisions to the data elements for FY 2016, and
4. provides an overview of the 4-year implementation of new data elements.

We have saved the two specification documents and this memo on the PLS Wiki:

<http://plsc.pbworks.com/w/page/28157083/Data%20File%20Items>. Please provide these files to your vendor if you have one.

1. Import File Specifications (FY 2016 PLS Import Specs Final.xlsx)

The import file specifications reflect the approved additions and changes to the data elements for FY 2016. This year's specifications include a new column noting the Item Number for each data element.

2. Edit Check Specifications (FY 2016 PLS Edit Changes to SDCs Final.xlsx)

The first tab in the edit check specification document, labeled "Edit Changes Web&Internal FY16," provides new or changed edit checks that reflect the approved changes to the FY 2016 data elements. As described in the "Proposal" column, changes to the FY 2016 edits include:

- new edit checks for variables added in FY 2016,
- revisions to edit check conditions due to changes in the numbering of data element items to accommodate added variables,
- updates to flag condition language due to revised variable names,
- updates to the flag condition language to fully define the logic explained in the edit message,¹

¹ A historical flag condition was found to not fully reflect the edit message during development of new edit checks. This edit was mirrored off similar edit checks that already exist. As a result, changes were made to all edit checks that had similar missing flag condition language. The edits affected by this change are reflected in the edit changes tab.

- edit checks that have been moved from an internal check (an edit run in the Post-Lock Edit Report that is not part of the Web Portal Edit Report) to a system check (an edit run in the PLS Web Portal Edit Report), and
- deletion of obsolete or ineffective edit checks per input from SDCs and IMLS.

The “All Edits Web&Internal FY16” tab includes both the unaltered edit checks brought forward from FY 2015 and the new and revised edit checks from FY 2016 changes. We provide definitions for each column header in the “Edit Changes Web&Internal FY16” and “All Edits Web&Internal FY16” tabs below:

- **Proposal** (“*Edit Changes Web&Internal FY16*” tab only): Provides a detailed explanation of the new, revised, and deleted edit checks.
- **Pubord**: Indicates the type of edit either a current edit (C) or a historical edit (H).
- **Critical**: Indicates if the edit is critical, not critical, or is an internal edit (an internal edit is run in the Post-Lock Edit Report and is not part of the Web Portal Edit Report). The flags in the column indicate a critical edit check if there is a “Y,” not critical if there is an “N,” and internal if there is an “I” in the column.
- **New Code**: Indicates if the edit is new or there has been a revision to the edit check. Note that edit check codes are assigned in the following manner:
 - First three digits refer to the data element number being checked. If there are multiple data elements for the check, it is typically the number of the data element that is a sum of the detail variables.
 - Last two digits are randomly assigned.
- **Old Code**: Indicates an edit check code that has been used in previous data collections.
- **Flag Condition**: Presents edit check logic code.
- **Edit Message**: Presents text that is displayed in the edit report associated with this edit.
- **Edit Condition**: Provides detailed explanation of the edit check that lists the data element numbers associated with this edit. This is not displayed in the edit report.

3. Data Element Revisions

The following data elements are new for the FY 2016 Data Collection:

Data element 553. [PHYSCIR]	Physical Item Circulation
Data element 554. [ELINFO]	Successful Retrieval of Electronic Information
Data element 555. [ELCONT]	Electronic Content Use
Data element 556. [TOTCOLL]	Total Collection Use

The following data element names and/or definitions have been changed from the FY 2015 data collection year; the revised data element numbers and names for FY 2016 are reflected below.

Data element 450. [BKVOL]	Print Materials ²
Data element 552. [ELMATCIR]	Use of Electronic Material
Data element 550. [TOTCIR]	Total Circulation of Materials

Please note the administrative entity data element numbers have changed for the following variables from FY 2015 to accommodate variables added in FY 2016.

Data element 575. [LOANTO]	Interlibrary Loans Provided To (formerly data element 553)
Data element 576. [LOANFM]	Interlibrary Loans Received From (formerly data element 554)

Additional detail on the FY 2016 data element changes can be found here: <http://plsc.pbworks.com/w/page/106309029/Data%20Element%20Definitions%20-%20FY2016>

4. Implementation of New PLS Data Elements

Although it is always hoped that states can adopt the new or changed data elements during the first year, we know that some cannot collect this information. If your state does not ask a FY 2016 data element as updated, you must submit all data on that element as missing (“-1”).

For more details on the 4-year implementation of PLS data elements please see the following document:

<http://plsc.pbworks.com/w/file/106309014/4%20year%20process%20for%202016%20data%20elements.docx>

Need Help?

Please contact us at PLS@air.org and/or 1-866-744-5746 (open from 9 am to 5 pm ET) if you have any questions.

² Note: There are no new or revised edit checks for this variable.