

PINES Executive Snapshots

PINES Executive Snapshots are a set of reports that are pre-run on a monthly basis for each branch and system. You can access the data for the most recent month, or for any month going back to January 2017.

1. Open up the **PINES Quick Reports interface** (<https://gapines.org/report-creator>).
2. Click on **Executive Snapshot**.
3. Select the branch(es) or system(s) you are interested in viewing reports for. You may also select "PINES" to see data for the consortium.
4. Select the month you wish to view data for. (Note, you cannot choose the current month.)
5. Check the checkboxes next to each type of information you would like to see.
6. Click **Run Report**.

The screenshot displays the 'PINES Quick Reports' interface. At the top, there is a navigation bar with links: Home | Quick Report Templates | My Quick Reports | My Draft Reports | **Executive Snapshot**. Below this is a green header bar that reads 'Create Your Executive Snapshot Report:'. The form is divided into three main sections:

- 1. Choose Location(s)**: A dropdown menu shows a list of locations including PINES, STATELIB, STATELIB-A, STATELIB-B, STATELIB-GDC, STATELIB-L (which is selected), and ARCPLS. To the right, it says 'Selected: STATELIB-L'. There is also a 'Select All' link.
- 2. Choose Month / Year**: Two dropdown menus show 'Dec' and '2019'. There are left and right arrow buttons to navigate between months and years.
- 3. Choose Report Data**: This section contains several groups of checkboxes, each with a 'Select All' link:
 - Patrons**: Active Users, New Users, Users Who Circulated Items, Users Who Placed Holds.
 - Bills**: Amount Owed By My Patrons, Amount Billed To My Patrons, Amount Collected From My Patrons.
 - Circulation**: Circulations, Circulations by Circulation Modifier, Circulations by MARC Type, Circulations by Non-Cataloged, In-House Use.
 - Holds/Transits**: Holds Sent From My Library, Holds Received At My Library, Internal Holds, Total Incoming Transits, Total Outgoing Transits, Total IntraPINES Sent, Total IntraPINES Received.
 - Collections/Items**: Total Items, Value of Items, Added Items, Deleted Items.

At the bottom center of the form is a green button labeled 'Run Report'.

A page will appear with links to view the reports for each of the branches/systems you selected in either

HTML (on screen) or Excel format.

[Home](#) | [Quick Report Templates](#) | [My Quick Reports](#)

Please click on the links below to view your reports

[ARCPLS-FRMAN](#) [HTML](#) | [Excel](#)

[ARL-WAT](#) [HTML](#) | [Excel](#)

[CLAYTN-HQS](#) [HTML](#) | [Excel](#)

The resulting report provides the pieces of information that you requested as well as change comparison data from the previous month and the previous year.

PINES Executive Reports

Branch: Friedman Branch Library

Date: September, 2019



Category	Report	Current Month	Previous Month	% Change from Previous Month	% Change from Previous Year	% of System Total	% of PINES Total
Patrons	Count of active users	10,666	10,684	0%	2%	15%	1%
	Adult	9,695	9,718	0%	2%	15%	1%
	Juvenile	971	966	1%	-1%	11%	0%
	Count of new users	61	66	-8%	-23%	13%	0%
	Adult	47	51	-8%	-20%	16%	1%
	Juvenile	14	15	-7%	-30%	9%	0%
	Count of users who circulated items	436	493	-12%	-28%	16%	0%
	Adult	403	460	-12%	-26%	17%	0%
	Juvenile	33	33	0%	-43%	12%	0%
	Count of users who placed holds	70	81	-14%	6%	15%	0%
	Adult	63	75	-16%	2%	14%	0%
	Juvenile	7	6	17%	75%	23%	1%
Circulation	Count of circulation	3,982	4,940	-19%	-20%	10%	0%
Holds/Transits	Holds sent from my library	278	317	-12%	-12%	12%	0%
	Holds received at my library from another library	425	460	-8%	-14%	17%	0%

Descriptions of Data

Patrons

Report Data	Description
Active Users	Count of active users at the specified point in time (broken out into adult and juvenile).
New Users	Count of user accounts created within the specified month (broken out into adult and juvenile).
Users Who Circulated Items	Count of users who checked out items within the specified month (broken out into adult and juvenile).
Users Who Placed Holds	Count of users who placed holds within the specified month (broken out into adult and juvenile).

Bills

Report Data	Description
Amount Owed By My Patrons	Total amount owed by patrons at the specified point in time.
Amount Billed To My Patrons	Total amount billed to patrons within the specified month.
Amount Collected From My Patrons	Total amount paid by patrons within the specified month.

Circulation

Report Data	Description
Circulations	Count of all circulations within the specified month (includes non-cat and in-house use).
Circulations by Circulation Modifier	Count of circulations broken out by circulation modifier within the specified month.
Circulations by MARC Type	Count of circulations broken out by MARC type within the specified month.
Circulations by Non-Cataloged	Count of circulations of non-cataloged items within the specified month.
In-House Use	Count of in-house use circulations within the specified month.

Holds/Transits

Report Data	Description
Holds Sent From My Library	Count of items sent by library to other libraries to fulfill holds within the specified month.
Holds Received At My Library	Count of items received by library from other libraries to fulfill holds within the specified month.
Internal Holds	Count of holds fulfilled within the specified month where the item owning library and patron home library are the same.
Total Incoming Transits	Count of transits received by library within the specified month.
Total Outgoing Transits	Count of transits sent by library within the specified month.
Total IntraPINES Sent	Count of items sent by system to other systems to fulfill holds within the specified month.
Total IntraPINES Received	Count of items received by system from other systems to fulfill holds within the specified month.

Collections/Items

Report Data	Description
Total Items	Count of total items owned at the specified point in time.
Value of Items	Total price of all items owned at the specified point in time.
Added Items	Count of items added within the specified month.
Deleted Items	Count of items deleted within the specified month.

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Permanent link:

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