

# Quick Reports Descriptions

This briefly describes the types of reports that are included in Quick Reports, and how they can be used. For additional usage details, see the Description notes for each report inside Quick Reports.

## Acquisitions

### **Cancellation Report with PO Name**

Acquisitions report that lists all on-order line item copies that have been cancelled, along with identifying data, and price by date range and owning library.

### **Fund Summary**

Acquisitions report that summarizes fund totals by library and fund year.

*Other acquisitions reports are currently in the full Reports interface, but will eventually be moved to Quick Reports when feasible.*

## Bills

### **Total Billed**

The total amount of all bills created automatically and manually in a certain time period.

### **Bills Forgiven for Our Items at Other Libraries**

List of bills that were forgiven by library staff at other libraries.

### **Bills Voided within a Date Range**

Bills that are entirely voided no longer show up in the staff client, so this report provides access to them. This can be used to track down the details of bills that should not have been voided.

### **Bills with Negative Balances**

List of bills with negative balances regardless of whether or not the patron's overall balance is negative.

### **Daily Detailed Cash Report**

Detailed list of payments received.

### **Daily Summary Cash Report**

Total sum of payments taken each day, grouped by payment type.

### **Detailed Forgive and Work Payments**

This report provides details of bills that were forgiven or "paid" for via work in exchange for fine forgival.

### **Invoice Reports**

Use these reports if your library policy is to invoice other libraries for payments they accepted on your

library's Lost, Long Overdue, and Damaged items. The Circulation Bills report covers normal payments at the desk on Lost, Long Overdue, and Damaged items. The Grocery Bills report covers normal payments at the desk on manually-added Damaged bills. The OPAC Payments report covers online payments that were made on these bill types.

### **Patron Credit Card Payment Report (Stripe)**

This report is for libraries who are accepting online payments through the OPAC.

## **Circulations**

### **Circulation Count**

Number of normal (ie, cataloged items) circulations for a date range.

### **Circulation Count (All Combined Types)**

Number of circulations of cataloged items and non-cataloged items, plus in-house use.

### **Circulation Count (Non-Cataloged Items)**

Number of circulations of non-cataloged items (eg, honor system paperbacks).

### **Circulation Count by Date and Hour**

Use this report to analyze when circulation is the busiest. The output displays hours in military time (ie, hour 3 would be 3:00-3:59 am). You will likely see circulation numbers for hours and days when your library is not open because online renewals count as circulations.

### **Circulation Count by Dewey Hundreds**

Breaks down normal circulation numbers into Dewey Decimal classes (100s, 200s, etc.) so that you can see which areas of your non-fiction section are getting the most use.

### **Circulation Count by Dewey Tens**

Breaks down normal circulation numbers into Dewey Decimal divisions (110, 210, etc.) so that you can see which areas of your non-fiction section are getting the most use.

### **Circulation Count by Shelving Location**

Breaks down normal circulation numbers into shelving locations so that you can see which areas are getting the most use. (This works best if you have well-defined shelving locations, and is not particularly useful if you put most things in a general section such as 'Stacks.')

### **Circulation by TCN by Year + Month**

Breaks down normal circulation numbers by TCN, showing year and month for checkout date. Note that this report takes a significant amount of time to run.

### **In-House Circulations**

There are two reports that provide your in-house usage numbers, one for cataloged items (items that you've scanned into the In-House Use screen), and one for non-cataloged items (items that you've entered just by category into the In-House Use screen).

### **Circulation History for Patron**

Use this when the patron's circulation history is too large and times out when trying to download in the OPAC. After downloading, the patron can go into their account settings, turn off circulation history, and then turn it on again in order to reset it. Note that this report takes a significant amount of time to run.

### **Top Circulating Titles**

Use this report to determine which items have circulated more than a designated number of times. Select your libraries or all libraries for a PINES-wide list.

## **Hold**

### **Hold Based Purchase Alert**

Use this report to identify items that you might want to order additional copies of.

### **Unfilled Holds (Captured but Not Fulfilled)**

This report shows items that were placed on your hold shelf for a patron, but were not picked up.

### **Unfilled Holds (Not Captured)**

This report shows holds that were requested for pickup at your library, but expired (holds expire after 6 months) before a copy was found for them. In some cases, this can mean that there aren't enough copies to fill all of the holds in a timely manner. It can also mean that all of the copies are missing (in this case, any copies that are still listed as Available in the catalog should be marked Missing).

## **Items**

### **Auditing Reports**

These two reports ("Items Added" and "Items Deleted") were created with guidance from a state auditor. They are meant to assist you with determining the value of each shelving location for auditing purposes.

### **Count of Items (Snapshot)**

This provides a total current count of all of your items broken down by shelving location, circulation modifier, and status.

### **Count of Items Added**

The number of items added to your library during a date range broken down by shelving location, circulation modifier, and creator (i.e., which cataloger added them).

### **Count of Items Added by Dewey Hundreds**

The number of items added to your library during a date range broken down by Dewey sections, shelving location, and circulation modifier.

### **Count of Items Deleted**

The number of items deleted from your library during a date range broken down by shelving location, circulation modifier, and deleting user (i.e., which cataloger added them).

### **Count of Items Deleted by Dewey Hundreds**

The number of items deleted from your library during a date range broken down by Dewey sections, shelving location, and circulation modifier.

### **Count of Items by Circulation Modifier**

The number of items owned by a library at the time the report is run, broken down by circulation modifier.

### **Count of Items by Dewey Hundreds**

The number of items in a library broken down by Dewey Decimal classes (000s, 100s, 200s, etc.).

### **Count of Items by Status**

The number of items owned by a library at the time the report is run, broken down by item status.

### **Basic Weeding List**

This creates a list of items that could be considered for weeding. You must know the names of your library's shelving locations (see the "List of a Library's Shelving Locations" report) in order to run this report. It can only be run on one shelving location at a time. (If you wish to run a report on all shelving locations, there is one available in the normal Reports interface under *Shared Folders > Templates > terran > Help Desk > Items > Basic Weeding List (without shelving location filter).*)

### **List of Items Added**

Similar to the "Count of Items Added," except with detailed item information. This information can be used to create lists of new books to post in the library or on the library's website.

### **List of Items Deleted**

Similar to the "Count of Items Deleted," except with detailed item information. Since deleted items no longer appear in the staff client, this report can be used to find information about items that have already been deleted.

### **List of Items Marked Claims Returned**

This list should be run regularly to check the shelves for items that patrons indicated they returned and were marked Claims Returned in the system. If these items are found, they should be checked in with the checkin date backdated to the Fine Stop Date on the report. If they are still not found after 45 days from the Fine Stop Date, they can be marked Lost (which will bill the patron).

### **List of Items by Circulation Modifier**

This report can be used to find a detailed list of items based on circulation modifier.

### **List of Items by Status**

This report can be used for any item status, but is most helpful for identifying items that have been marked Missing from the collection. It is a good idea to check the shelves for these items periodically to see if they have been found or if they should be deleted from the system, or if replacement copies should be ordered.

### **List of Items for Inventory Processing**

This report is used with the [inventory instructions](#) to identify a list of items that *should* be on the shelf, but are not there. These items should be double-checked and then if not found, they should usually be marked Missing.

## List of a Library's Shelving Locations

You will need to know the exact name of your library's shelving locations in order to run some of the other reports (such as the "Basic Weeding List"). This report is also useful for identifying shelving locations that are incorrectly used by your items. For example, if you have 20,000 items in FICTION and 2 items in FIC, it is probable that the 2 items in FIC should be corrected to be in FICTION. To determine what these two items are that should be corrected, you could then run the Shelf List report for the FIC shelving location.

## List to Identify Items with Incorrect Shelving Locations

List of items whose owning library does not match their shelving location's owning library.

## Transit Reports

There are three transit reports available in Quick Reports. "Transits Sent from My Library" and "Transits Sent to My Library" are essentially the same as the content you see in the staff client under Local Admin > Transit List. Both of these show all the items that are currently in transit either from or to your library, regardless of which library owns them. The third report, "My Library's Items In Transit," lists all if the items your library owns that are currently in transit between any libraries (whether they are your library or not).

## OCLC Holdings Maintenance: Last Copies

This report is for use by catalogers for assistance with the [OCLC holdings maintenance](#) that catalogers are required to do.

## Pre-Cat List

Use this report to identify pre-cat items that may have been returned but not routed to the proper location for record cleanup.

## Shelf List Reports

Provides a complete list of all items that are in a shelving location and call number range, along with their current status. "Shelf List (by Shelving Location)" includes a filter for a specific shelving location that you input into the parameters of the report. "Shelf List (All)" does not include this filter and will show items from all shelving locations.

# Patrons

## Count of New Users

Number of new (and active) user accounts added within a specified date range for selected permission groups (Patron, Outreach, GLS, etc.).

## Count of Patrons with Items Out

Number of active patrons with the selected home library who currently have items checked out.

## Patron Count by City

Number of active patrons with the selected home library broken down by the City name as entered in the address field. This can be used when determining where the majority of users of your system are located for funding or planning purposes. If you see problems where the city is misspelled or entered incorrectly, you can use the Patron Search in the staff client to search for the misspelled city name and correct the

patron accounts.

### **Patron Count by County**

Similar to the Patron Count by City except broken down by the County that was entered in the patron account.

### **Patron Count by Date of Birth**

The number of active patrons by date of birth (year+month) so that you may determine the number of patrons in any age range.

### **Patron Count by Patron Permission Group**

The current number of active patrons broken down by permission group (Patron, GLS, Homebound, etc.).

### **Patron Count by ZIP Code**

Similar to the Patron Count by City except broken down by the postal code that was entered in the patron account.

### **Voter Registration Survey Responses**

Lists the number of each type of voter survey response during a date range for reporting to the state ([more information on state reporting requirements](#)).

### **List of Barred Patrons**

Provides a list of your barred patrons. This list should be reviewed periodically to determine if some patrons should be removed from the barred list.

### **List of New Patrons**

This report can be used by managers to check that new patron data is being entered correctly.

### **List of Patrons or Staff by Permission Group**

This report can be used to obtain a list of a particular user group to be sure that accounts are being managed properly, or that those user groups are being served properly. For example, the list of Institution patrons could be checked periodically to determine if they are in good status and if their accounts are coming up for renewal. You can also get this information in the staff client now by using the Patron Search and searching by a particular permission group type without anything typed into the name fields. (This didn't work properly in the old XUL staff client, but works very well in the web client.)

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