

PINES New Reports Interface

Welcome

PINES staff and the PINES Reports Working Group are working on requirements to create a new reports interface for Evergreen. We hope to streamline and simplify the process for running basic daily reports so that front-line staff and directors can get the information they need quickly and independently of technical library staff.

The new interface will not recreate or replace the existing reports interface.

We appreciate your help with identifying the information most-needed by library directors and front-line staff.

Please send any inquiries about this project to:

pines-reports-wg@list.georgialibraries.org

Reports Working Group

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Patron Information

1. PATRON TOTALS

What type of patron totals do you need? Please rate the following options:

| | I regularly need this to do my job | I occasionally could use this for my job | I do not need this for my job |
|---|---------------------------------------|---|-------------------------------|
| Active Patrons Count (Total active patrons currently registered) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| New Users Count (Total patrons registered during a specific time) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Total Patrons with Circulated Items (Total patrons who have checked out materials during a specific time) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

2. How do you need the patron totals displayed and broken down? Please rate the following possibilities:

| | I regularly need this to do my job | I occasionally could use this for my job | I do not need this for my job |
|------------------------|---------------------------------------|---|-------------------------------|
| By Patron Group | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| By County | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| By City | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| By Zip Code | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Other (please specify) | | | |

3. VOTER REGISTRATION

| | I regularly need this to do my job | I occasionally could use this for my job | I do not need this for my job |
|--|---------------------------------------|---|-------------------------------|
| Voter Registration Totals (Total to voter survey, broken down by answer, during a specified time period) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

4. Any other type of patron-related information you need to do your job?

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Circulation Information

5. GENERAL TOTAL CIRCULATION (Provides the total number of circulations, including renewals, during a specified time period)

How do you need this information broken down and displayed? Please rate the following options:

| | I regularly need this to do my job | I occasionally could use this for my job | I do not need this for my job |
|-------------------------|------------------------------------|--|-------------------------------|
| By circulation modifier | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| By shelving location | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| By Dewey hundreds | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| By legacy stat cats | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| By MARC item type | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| By MARC lang | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Other (please specify) | <div><div></div><div></div></div> | | |

6. OTHER CIRCULATION TOTALS

There are other type of circulation counts we can provide. Please rate the following options:

| | I regularly need this to do my job | I occasionally could use this for my job | I do not need this for my job |
|--|------------------------------------|--|-------------------------------|
| Non-Cataloged Circulations Count (Total circulations of non-cataloged items, listed by non-circ item type, during the specified time period) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| In-House Non-Catalogued Circulation Count (Total in-house circulations of non-cataloged items, listed by non-circ item type, during the specified time period) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Hourly Circ Count (Total circulations listed by hour of day during specified time period) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

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7. CIRCULATION-RELATED LISTS

| | I regularly need this to do my job | I occasionally could use this for my job | I do not need this for my job |
|--|------------------------------------|--|-------------------------------|
| Long Overdue List (List of items that are a specified number of days overdue with patron information) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Claims Returned List (List of items marked "ClaimsReturned" with patron information) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| In-House Cataloged Circulation List (List of items that have circulated in-house during a specified time period) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Top Circulating Titles (Top 20 highest circulating titles broken down by audience and genre) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

8. Any other type of circulation-related information you need to do your job?

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Holds and Transits Information

9. TRANSIT TOTALS

| | I regularly need this to do my job | I occasionally could use this for my job | I do not need this for my job |
|---|------------------------------------|--|-------------------------------|
| Incoming Transits Count by Facility (Count of incoming transits, listed by facility including branches, during a specified time period) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Outgoing Transits Count by Facility (Count of outgoing transits, listed by facility including branches, during a specified time period) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

10. HOLDS AND TRANSITS LISTS

| | I regularly need this to do my job | I occasionally could use this for my job | I do not need this for my job |
|---|------------------------------------|--|-------------------------------|
| Overdue Incoming Transits List (List of all items in transit to a facility for longer than a select number of days) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Overdue Outgoing Transits List (List of all items in transit from a facility for longer than a select number of days) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Unfilled Holds (List of unfilled holds by pickup location) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

11. Any other type of hold or transit information you need to do your job?

Item Information

12. Item Totals (Number of items currently in the collection)

For a general item count, how do you need this information displayed and broken down?
Please rate the following possibilities:

| | I regularly need this to do my job | I occasionally could use this for my job | I do not need this for my job |
|-------------------------|------------------------------------|--|-------------------------------|
| By shelving location | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| By Dewey hundreds | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| By circulation modifier | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| By MARC item type | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| By copy status | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Other (please specify) | <div></div> | | |

13. Other Possible Item Totals

| | I regularly need this to do my job | I occasionally could use this for my job | I do not need this for my job |
|---|------------------------------------|--|-------------------------------|
| Items Added Count (Number of items added to catalog during a specified time period) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Items Deleted Count (Number of items deleted to catalog during a specified time period) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Other (please specify) | <div></div> | | |

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14. Item Lists

| | I regularly need this to do my job | I occasionally could use this for my job | I do not need this for my job |
|---|------------------------------------|--|-------------------------------|
| Items Added List (List of items added to catalog during a specified time period) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Items Deleted List (List of items deleted from catalog during a specified time period) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Item Status List (List of items currently in the collection with a specific copy status) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Shelflist (List of items currently within a specified shelving location or call number range) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Weeding List (List based on call number range, publication year, and number of circs) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Holdings by Subject Heading Keyword (List of items with a specified keyword in the subject heading) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Spanish Language Materials List (List of Spanish-language items) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Pre-Cataloged Items List (List of pre-cataloged items not currently checked out) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Deleted Book History (Last circulation and other item information for a specific barcode that has been deleted from the system) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

15. Any other type of item-related information you need to do your job?

Bill and Payment Information

16. BILL & PAYMENT TOTALS

| | I regularly need this to do my job | I occasionally could use this for my job | I do not need this for my job |
|--|------------------------------------|--|-------------------------------|
| Total Billed (Total amount billed by the library during a specified period of time) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Total Payments Received (Total amount paid to the library during a specified period of time) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Outstanding Bills Summary (Total outstanding bills from a specified period of time) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

17. BILL & PAYMENT LISTS

| | I regularly need this to do my job | I occasionally could use this for my job | I do not need this for my job |
|---|------------------------------------|--|-------------------------------|
| Patron Bill & Payment History (List of bill and payment history for a specific patron, including related circulation information) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Payments Received List (List of all payments received during a specified time period, including patron and staff workstation information) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

18. Any other type of billing or payment information you need to do your job?

Please tell us more about yourself:

19. Your Library Service Area(s):

- ☐ Administration
- ☐ Cataloging & Tech Services
- ☐ Circulation
- ☐ Reference & Information
- ☐ Technology

Other (please specify)

20. Your position within the library:

- ☐ Branch Manager
- ☐ Business Office Staff
- ☐ Department Head
- ☐ Director
- ☐ Front-line Staff
- ☐ Technical Services Staff

Other (please specify)

21. Are you responsible for preparing and/or presenting information to library boards, funding agencies, or the media?

- ☐ Yes
- ☐ No

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Executive Snapshot

We plan to include an executive snapshot feature that should be particularly helpful to library directors and staff that prepare and/or present information to boards, funding agencies or the media.

The executive snapshot will provide essential information in a format that is ready to print and share with others.

Please help us to prioritize the following data points and features, keeping in mind that the executive snapshot should be concise enough for easy printing and sharing.

22. PATRONS

| | Essential for Snapshot | Could be Useful for Snapshot | Unnecessary for Snapshot |
|--|------------------------|------------------------------|--------------------------|
| Count of active users (non-deleted, non-expired) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Count of new users | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Count of users who circulated items | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Count of users with active hold requests | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Count of active users by juvenile/adult [creates a sub-list of totals] | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Count of active users by city [creates a sub-list of totals] | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Count of active users by county [creates a sub-list of totals] | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Count of active users by ZIP code [creates a sub-list of totals] | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Count of out-of-state users | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Other (please specify)

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23. BILLS

| | Essential for Snapshot | Could be Useful for Snapshot | Unnecessary for Snapshot |
|---|------------------------|------------------------------|--------------------------|
| Total amount owed to my library | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Total amount billed this month | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Total amount collected this month | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Totals by billing type [creates sub-list of totals] | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Totals by payment type [creates sub-list of totals] | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Amount forgiven | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Amount voided | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Amount received by goods | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Amount received by work | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Other (please specify)

24. CIRCULATION

| | Essential for Snapshot | Could be Useful for Snapshot | Unnecessary for Snapshot |
|---|------------------------|------------------------------|--------------------------|
| Count of circulation by county [creates a sub-list of totals] | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Count of circulation by circ type [creates a sub-list of totals] | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Count of non-cat circulation by type [creates a sub-list of totals] | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Count of in-house use | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Other (please specify)

25. HOLDS & TRANSITS

| | Essential for Snapshot | Could be Useful for Snapshot | Unnecessary for Snapshot |
|---|------------------------|------------------------------|--------------------------|
| Total holds fulfilled | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Total holds placed to be picked up at my library | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Total incoming transits (includes transits within library system) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Total outgoing transits (includes transits within library system) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Total IntraPINES sent (excludes branches) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Total IntraPINES received (excludes branches) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Other (please specify)

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26. Items

| | Essential for Snapshot | Could be Useful for Snapshot | Unnecessary for Snapshot |
|---|------------------------|------------------------------|--------------------------|
| Count of non-deleted items | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Combined total price of non-deleted items (Value of collection) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Count of added items | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Count of deleted items | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Count of Items Added by Date [creates a sub-list of totals] | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Total Items Added by Cat User [creates a sub-list of totals] | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Other (please specify) | | | |
| <div></div> | | | |

27. EXECUTIVE SNAPSHOT FEATURES

Please rate the following the features:

| | Essential for Snapshot | Could be Useful for Snapshot | Unnecessary for Snapshot |
|---|------------------------|------------------------------|--------------------------|
| Ability to see previous month's totals | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Ability to see current month-to-date totals | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Ability to select a specific month | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Ability to select more than one month | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Ability to see % change from previous similar time period | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Ability to see % change from similar time period last year | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Ability to see library's totals as a percentage of PINES totals | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Other (please specify) | | | |
| <div></div> | | | |

28. Additional suggestions for the executive snapshot:

Contact Information

29. Are willing to have us contact you with questions regarding your comments or suggestions? If so, please complete the following form:

| | |
|---------------|----------------------|
| Full Name | <input type="text"/> |
| Email Address | <input type="text"/> |
| Phone Number | <input type="text"/> |

Thank You!

Thank you for completing our survey!