sierra circulation

Circulation Statistics

# Circulation statistics can be either transaction-based statistics or record-based statistics. Record-based statistics may also include some circulation activity information, such as a summation of YTDCIRC (year to date circulation) broken down by fixed code and call number.

**A comparison of Statistics and Web Management Circulation Reports**

[**Statistics**](https://documentation.iii.com/sierrahelp/Default.htm#sgstat/sgstat_main_page.html)

# Provides a real time report on a user-specified set of records, e.g., record-based statistics.

# Can show a snapshot in time (saved results).

# Can include some circulation activity information, such as a display of Total Checkout or Total Renew for a set of records. The values are simply totals without reference to dates. There is no ability to limit counts like Total Checkout or YTDCIRC by date in Statistics reports.

# Supports export to a variety of products and in multiple formats.

# Can schedule reports to run off hours.

# Can save queries and results files.

# Can run multiple reports at one time if running in the background.

# Can generate reports on fixed codes and call numbers.

[Web Management Circulation reports (Web Browser Interface)](https://documentation.iii.com/sierrahelp/Default.htm#sgwr/sgwr_browser.html)

* Provides a selection of transaction-based reports, meaning that the system is reporting from stored information gathered as a result of circulation transactions.
* The Circulation Title Report is a real time, record-based report.
* The Circulation Patrons Report displays statistics on all items that were checked out as of the most recent circulation cron jobs, as well as the patrons who have those items. Manual fine information is also included.
* The Circulation Requests report shows all patron requests that the library accepted, either by placing materials on hold or by printing paging slips. Detail is available for this month and last month. (Note that this data is available only if patrons are being verified while requesting an item.)
* The Circulation Cross Tab report allows the cross tabulation of patron and item data in a transaction-based report.
* Can specify a time period for which to see transactions.
* Can download reports.

[Web Management Circulation reports (Spreadsheet Interface)](https://documentation.iii.com/sierrahelp/Default.htm#sgwr/sgwr_spreadsheet.html)

* A select group of Circulation reports available from the web browser interface may be viewed and downloaded in this interface.

**Creating Reports**

Choose a report based on what information is needed. In some cases, the user can run more than one report to look at the same set of records, getting different but useful information from each report.

Example One

A library might wish to generate statistics on a set of books on skiing purchased with monies from the Friends of the Library. The library could use Circulation Title reports or Statistics or both.

A Web Management Circulation Title report on the review file of skiing titles will include the following:

* A snapshot of total checkouts, YTDCIRC and LYRCIRC for each title in the review file (or range) specified. Each title will display.
* The number of attached items (report can only be generated on bib records).
* The current totals for internal use counts (raw totals, without regard to dates).

This report is best for:

* Comparing internal usage to checkouts on a title-by-title basis.
* Displaying activity on individual titles in a report format.
* Viewing the current number of items attached to each bib on a title-by-title basis.

A Statistics report on the review file of skiing titles (reporting on items or on item data for bibs) will include the following:

* A snapshot of total checkouts and renewals, YTDCIRC and LYRCIRC, among other fields, for the records in question, broken down by fixed codes and call number.
* Bib titles are not displayed.

This report is best for:

* Viewing activity such as total checkouts, YTDCIRC, and LYRCIRC for the record set broken down by fixed code, such as Item Type or Item Location. (Activity fields are raw totals, without regard to dates when the activity occurred.)
* Looking at totals of item prices for the records broken down by fixed codes or call number.
* Looking at record counts broken down by fixed code or call number.

In addition to reporting on items or item data for a set of bib records, staff can choose to run a Statistics report on bib records or bib data for a set of item records, in which case bib fields are displayed in the report. Library staff may run a Cross Tab, Field Statistics, or Periodic report.

Example Two

The library might wish to report on patrons with outstanding overdues and/or fines. The library could look at this information in both Web Management Circulation reports and Statistics.

The Web Management Circulation Patrons Report includes three separate reports, each current to the last cron job run and each covering the entire database:

* Patron type report. This report shows the number and percentage of patrons with items, along with the number of items out, average items per patron, number of items overdue, number with fines, and monetary total of fines.
* Item type report. This report shows the current total of items out by ITYPE. It includes the number overdue, number with fines, and amount of fines. It includes information on manual charges and fines for deleted items.
* Item location report. This report shows the current total of items out by item location. It includes the number overdue, number with fines, and amount of fines. It includes information on manual charges and fines for deleted items.

This report is best for:

* Showing overdues and fines by item type and location
* Showing detailed item and fine information broken down by patron type.
* Showing numbers of patrons with items overdue out of total number of patrons with checked out items.

The Statistics report on patrons (e.g., field statistics) includes for each fixed field in the patron (e.g., PCODE1, Home Library, etc.), a current snapshot of various totals, including Total Checkout, Total Renewals, Current Checkouts, and Money Owed. It includes a count of patron records for each fixed field. The library might create a review file of patrons with overdues and/or fines in order to limit the report to just those patrons with problem records. Or the library might choose to report on a subset of patrons based on some other criteria.

This report is best for:

Generating money owed information for a subset of patrons

* Showing money owed by fields not available in the Circulation Patrons report, such as Home Library.

More Reports to try

* Report on all items by inventory date. Create a Statistics periodic report on the range of all items, reporting on inventory date.
* Find money owed by patrons whose last activity was within the last 14 quarters, broken down by the branch at which the patron registered. (Staff use home library to track registering branch.) Create a Statistics periodic report on patrons, reporting on the CIRCACTIVE date. Use a periodic report on the range of the database (patron records) to avoid creating a list. If the library runs the report on the entire database, any patron with a CIRCACTIVE date field that does not fall within the specified date limits will not be included in the report. The system notes how many records have CIRCACTIVE dates that fall outside the specified time period or that have blank dates.

Example:

Periodic: 12002 records in range, 1198 before the range, 0 after the range, and 142 with blank dates.

* Report on items overdue for three years. The report can be based on DUE DATE. Only records within the specified range are included in the report.
* Report on patron records expiring within a specified time frame. Use a periodic report on the range of the database, reporting on EXP DATE for a given time period.

**Overview of Circulation Statistics Accumulation Process**

This overview explains how the system accumulates circulation statistics for circulation transaction reports (Web Management Circulation Reports).

The Circulation Transaction File

The circulation transaction file contains information about all of the day's circulation transactions, except cancelled holds. These transactions include:

* Check-ins
* Check-outs
* Filled holds (held items checked out to their requesting patrons)
* Holds
* Holds with recalls
* Materials booking transactions
* Renewals
* In-House Use counts

An entry in the transaction file stores the following information about a transaction (note your library may have renamed some of these fixed-length fields):

* Type of transaction
* The Statistics Group number in the login used for the transaction or the user-specified Statistics Group number if this is an Offline Circulation transaction
* Transaction date
* Patron record number of the patron for whom the transaction was done
* PCODE1
* PCODE2
* PCODE3
* PTYPE
* Item or Bib record number, depending on the transaction
* ICODE1
* ICODE2
* ITYPE
* Item location
* Loan rule number
* Due date or count type (e.g. due date for a checkout, count type for internal use counts, etc.)
* PCODE4 (at sites which have purchased Consortium Management Extensions and which have enabled PCODE4 as part of that set-up)

The Overnight Accumulation Process

In each 24-hour period, usually around midnight or in the early morning hours (varies from library to library), the system runs a special accumulation process that updates the circulation transaction file and special statistical files. This process is sometimes referred to as a 'cron job'.

These statistical files are maintained separately: the All Activity (stats by terminal) report file, transaction statistics (Bookings, Checkouts, Filled holds, Renewals, and In-house Use Counts) file, Hourly Checkout Statistics file, Patrons That Have Items file, Owning/Home (consortia) and Non-owned (consortia) files. Entries are created in these statistical files from which statistical reports displays will be drawn. In addition to storing such information about the transactions as Item location or PTYPE, the system looks up and stores SCAT table category numbers where appropriate. The system also looks up and stores information about 'owning' and 'non-owning' libraries at those sites with Consortium Management Extensions (Consortia Statistics).

The following actions are taken by the system:

1. Information about that day's transactions is added to the "Yesterday's Statistics" file.
2. Information about that day's transactions is added to the "Month to Date Statistics" file, as well as the "Year to Date Statistics" file.
3. Transaction information in the "Yesterday's Statistics" file is moved to the "2 Days Ago Statistics" file.
4. Transaction information in the "2 Days Ago Statistics" file is moved to the "3 Days Ago Statistics" file.
5. The first time the process runs in a new month, "Current month" statistics are moved to a file which is identified by month and year, e.g., June 2020.

If the accumulation process does not run one or more nights, for example because the system was shut down when the process would normally have run, the accumulated transaction data will not be lost and will be processed the next time the process runs. Only daily statistics will be affected, unless the skipped night occurred on a month boundary. In that case, some transaction information from this month may be combined with activity for the previous month.

Looking at Holds and Requests Information in Circulation Reports

The Web Management Circulation All Activity report by terminal number (statistics group number) displays the statistics group numbers present in logins placing holds. An entry for 'terminal 0' represents activity that is the exception to this rule. For information about terminal 0 in this report, see Terminal 0 in Viewing All Activity Circulation Reports FAQ.

Whether or not the system uses the login's statistic group for reports that include WebPAC patron activity is determined by the library's setting for the STATGROUP web option. If this option is not set to 'login', the default value '800' is used for all WebPAC activity.

The Filled Holds report includes holds where the held item was checked out by the holding patron. The item or bib does not have to be on the holdshelf when circulated to appear in the Filled Holds report. If the patron checks out an item that would fill the patron's hold (item or bib level hold) before the item is checked in to trigger the hold, the transaction still counts as a filled hold.

Blank Codes for Consortia Statistics

The "blank code," used in both the "OWNING library/home library report" and the "non-OWNED items circulated" report, is the result of a lack of information available on certain circulation transactions. This code is represented by "?????" in the character-based circulation reports and a blank space in Web Management Circulation reports.

To limit the number of transactions that fall in the "blank code" category, review the following:

* Verify that the bibliographic location is included with the list of associated items in the Location Mapping table.
* Account for all locations in the Location Mapping table.
* Verify that all items have a location that is in the Location Mapping table.
* Verify that all patron records have a home library.
* Verify that all statistic group numbers are accounted for in Statistic Group Names.
* In Login Administration, verify that all logins have a Statistics Group number.

Making changes to correct the above conditions does not alter previously generated statistics. Changes made affect only future statistics.

Best Practices

* To report on something for either Statistics or Web Management Circulation reports, the information must be coded into the data. Examples of information that library staff might want to report on include patron age, census tract area, year of study, major area of study, city of residence, etc. Library staff must code data into records so that reports needed will be available.
* Make changes to a SCAT table at the beginning of a month. Changes to a SCAT table are not retroactive, so library staff will need to view reports after the change separately from reports before the change. By making the change on the first day of a month, staff will be able to specify user defined time periods for reports that mutually exclude each other. For example, if you updated the SCAT table on April 1, 2020, view reports for April 2020 and more recent months separately from reports for earlier months, e.g. January 2019-March 2020.
* Similarly, changes to codes used in circulation reports can impact report displays (particularly deletions or label changes). Make changes on the first day of a month so that reports dating from the change can be generated separately.

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