sierra circulation

How to Complete the Year-End Rollover of YTD and LYR Circ Stats

The timing of this process depends on which year your library follows. Most public libraries operate on the calendar year so this process would need to be done on Dec. 31. Most academic and school libraries operate on a calendar based on the school year, July 1 – June 30, making June 30 the target date. The goal is to update these items before the “new year” begins so that annual circulation reports are as accurate as possible.

This procedure updates the circulation data within the item records in the YTDCIRC field (the year just completed) and the LYRCIRC field (the year previous to that.) Libraries with smaller collection may want to keep the process simple and run it over all the items in the database. Larger libraries may choose to limit the process to only the materials that have circulated in the last two years. The only difference in the process is how the review file is created. Both options will be described.

Reminders:

1. A few days prior to the update, remind the librarians/staff to run any statistical reports they need that are based on the data in the YTDCIRC field and the LYRCIRC field in the item records.
2. Empty the large buckets in create lists – you may need them.

Here is a sample of a simple query. This will create a file of all the item records in the collection.

* Store record type = item
* Range = all item records
* Type = item
* Field = agency or location
* Condition = equal to or starts with
* Value A = the agency number or the first 2 letters of the location code

Here is a sample of a more complex query for a library with a large collection. (Libraries with extremely large collections may want to create several review files for specific locations.) This query will create a file of items that have circulated in the year that is ending and also the year before that.

* Store record type = item
* Range = all item records
* Type = item
* Field = agency or location
* Condition = equal to or starts with
* Value A = the agency number or the first 2 letters of the location code (or the specific location code if you’re running the process of specific collections)

Next line:

* Operator = and
* Type = item
* Field = YTDCIRC
* Condition = greater than
* Value A = 0

And the next line:

* Operator = or
* Type = item
* Field = LYRCIRC
* Condition = greater than
* Value A = 0

“Group” the query by putting the cursor on the second line, hold down the shift key and move the cursor to the end of the third line. The “group” button will activate and when it is clicked, parenthesis will be placed at the beginning and end of the lines.

After the create list has completed, open it and check a number of the records to verify you’ve found the ones you need. Remember to close the review file.

The following steps apply to all libraries.

Log into Sierra Admin Corner.

From the main menu, select:

D (database maintenance)

R (rapid update)

enter your initials and password

Select I (items)

Maintain YTDcirc and LYRcirc? YES

Select C to continue

The answers to the next two questions will depend on your library’s policy regarding this data. Many libraries zero out (empty) the YTD totals and move them to the LYRCIRC data field. Others don’t. The Total Checkouts field contains the count for the number of times an item circulates during its “lifetime” so that’s why the YTD data is moved to the LYR field. Make sure you know what the policy is for your library before you get to this point.

Zero YTD circ totals? YES

Replace LYRcirc with number in YTDcirc? R

Update from review file – select the file from the list

Choose U to update

The system displays a window with rows of little dots scrolling across the screen. When the updates to the records in that file are finished, the system will display a message about the total number of items updated and you will be reminded to run a full back up as soon as possible.

Press the space bar and repeat the steps to complete the stat rollover on the rest of the review files.

Document the files; site name, number of items updated and date of update on a worksheet so you can keep track of which library’s items have been updated.

Access [this link](https://documentation.iii.com/sierrahelp/Default.htm#sril/sril_records_fixed_field_types_item.html) for more information regarding updating the YTDCIRC and LYRCIRC fields in item records.

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