

## Annual Report Numbers Generation

### Phase 1: Statistics on Items (for Library Holdings portion of report)

Open **Create Lists** in Sierra.

Find a review file of appropriate size for your collection and click **Search Records**.

Set up your search as follows:

Name your search XXX Collection – ITEMS (XXX = your 3 letter code)

Record type: Items

Select Index then Barcode and add your ITEM barcode prefix 3xxxx and 3xxxx.

(xxxx = your 4 digit barcode prefix which can be found on OSLX)

### **For Branch systems:**

Index your barcode as instructed above. You do not need to break things out for each branch. The exceptions to this are **Providence Public, Providence Community** items. Please consult OSL for additional instructions on this.

The screenshot shows the 'Review Files' window in Sierra. A 'Boolean Search' dialog box is open, showing the following search criteria:

- Review File Name: JOH Collection - ITEMS
- Store Record Type: ITEM i
- Index: Barcode (b)
- Value A: 32075
- Value B: 32075

The search buttons at the bottom of the dialog are: Search, Use Existing Search, Retrieve Saved Query, Save, Save As, and Close.

When your list finishes running, click on “Dedupe.” Write down the number of items in the list. **This is your total item count for your collection.**

Highlight your list and click **Search**. Click yes to the warning.

Overwrite your file name so the name is XXX Collection – BOOKS (XXX = your 3 letter code).

Click **Retrieved Saved Query**. Click on Query Name to sort the list, then find **OSL Annual Report Holdings BOOKS**.

Highlight this list and click Select. Rename your file as XXX Collection – BOOKS.

**Add your barcode range** and click **Search**. Record the total number of items in this list. This number is your BOOKS total for the annual report.

Repeat the above process with the following four lists: OSL Annual Report Holdings VIDEO, AUDIO, SERIAL and OTHER.

Now you should have your total number of items plus totals for these four categories: BOOKS, VIDEO, AUDIO, SERIAL and OTHER

Phase 2: Circulation of Items (for Circulation portion of report)

Open OSLConnects and log in. Go to **Support Materials** >> **Materials for Staff** and search for “template”. Open **Icode Template for Statistics** and download the attached file: *Statistics Template for FY??*.

Open the file and click “Save As” >> Name it XXX Circ FY?? (XXX = your 3 letter code) Make sure you know where you saved the file on your computer. Minimize it and leave it alone for now.

Return to Sierra and choose **Reports** >> **Circulation Activity Reports**. This will open Web Management Reports.

Click **All Circulation Activity**. This will prompt you to enter your Username and Password. You may use your library’s Sierra Circ Login.

Choose the following Settings:

**Dates:** *User Specified*

**Start Date:** *2013 July*

**End Date:** *2014 June*

**Sort by:** *Limit*

**Limit by:** *Stat Group*

**Stat Groups:** Click on your Stat Group (aka Terminal Number)

\*\*\*\*For Branch Systems:

You must select the terminal numbers of **all your branches**.

[For example, TIV would select 58 & 59. SKI would select 52, 53, 54 & 753]

**Report by:** *ICODE1*

**Click Submit.**

Click the **Review** tab at the top of your page to see the status of your report. (It may take some time to generate.)

When the report is complete, click on your report’s name to download and save the Excel file to the location where you saved the Icode Template.

Open the Excel file. Depending on your version of Excel and your security settings, you may have to click **Enable Editing** at the top of the screen.

Next, highlight, right click & delete all columns EXCEPT A (ICODE1) & E (ITEMS CIRC).

	A	B	C	D	E	F	G	H	I
1	CIRCULATION ACTIVITY by STAT GROUP (Jul 13-Jun 14)								
2	30								
3	ICODE1	CHKOUTS	CHKINS	RENEWALS	ITEMS CIRC	HOLDS	HI/RECLL	TOTAL #	PERCENT
4	27	1	0	0	1	0	0	1	0.0%
5	3100	38	34	1	39	0	0	73	0.0%
6	10000	75	71	9	84	0	0	155	0.1%
7	10101	9,319	9,693	1,185	10,504	59	0	20,256	12.4%
8	10103	1	11	2	3	0	0	14	0.0%
9	10106	2,786	2,737	360	3,146	65	0	5,948	3.6%
10	10108	5	5	0	5	0	0	10	0.0%
11	10109	7	5	0	7	0	0	12	0.0%
12	10110	21	38	3	24	0	0	62	0.0%
13	10111	3	4	0	3	0	0	7	0.0%
14	10120	0	1	0	0	0	0	1	0.0%
15	10121	5,372	5,804	1,445	6,817	27	1	12,649	7.7%
16	10122	310	298	56	366	0	0	664	0.4%
17	10124	4	5	1	5	0	0	10	0.0%
18	10130	3	2	0	3	0	0	5	0.0%
19	10131	1	1	0	1	0	0	2	0.0%
20	10132	249	204	58	307	1	0	512	0.3%
21	10133	3	4	7	10	0	0	14	0.0%
22	10134	18	16	7	25	2	0	43	0.0%
23	10135	74	64	12	86	0	0	150	0.1%
24	10136	11	18	1	12	0	0	30	0.0%
25	10137	2	7	1	3	0	0	10	0.0%
26	10138	73	121	14	86	1	0	210	0.1%

	A	B
1	CIRCULATION ACTIVITY by STAT GR	
2	30	
3	ICODE1	ITEMS CIRC
4	27	1
5	3100	39
6	10000	84
7	10101	10,504
8	10103	3
9	10106	3,146
10	10108	5
11	10109	7
12	10110	24
13	10111	3
14	10120	0
15	10121	6,817
16	10122	366
17	10124	5
18	10130	3

You should be left with two columns: **Icode1** and **Items Circ.**

Delete the top rows with the descriptions for each column and any rows at the end of the list with no ICODE or labeled **Totals**.

	A	B
1	CIRCULATION ACTIVITY by STAT GR	
2	30	
3	ICODE1	ITEMS CIRC
4	27	1
5	3100	39
6	10000	84
7	10101	10,504
8	10103	3

195	31355	1
196	31400	11
197	31401	1
198	31421	0
199	31500	45
200	31560	8
201	32400	1
202	32600	6
203	32601	11
204		0
205	Total	82,483
206		
207		

Copy your **Icode1** and **Items Circ** columns into the template (switch back to your Statistics Template worksheet) like so:

You must adjust any old Icodes to the new 5-digit format to get rid of errors in the Audience and Format columns.

	A	B	C	D	E	F	G	H	I
1	<b>ICODE1</b>	<b>Circulation</b>	<b>AUDIENCE</b>	<b>FORMAT</b>		<b>ICODE1</b>	<b>DESCRIPTION</b>	<b>AUDIENCE</b>	<b>FORMAT</b>
2	27	1	#N/A	#N/A		0	Bad Code	Other	Other
3	3100	39	Other	Other		10	Bad Code	Adult	Media
4	10000	84	Adult	Print		43	Bad Code	Adult	Print
5	10101	10,504	Adult	Print		94	Bad Code	Adult	Print
6	10103	3	Adult	Print		170	Bad Code	Adult	Print
7	10106	3,146	Adult	Print		1121	Bad Code	Adult	Print
8	10108	5	Adult	Print		3010	Bad Code	Juvenile	Print
9	10109	7	Adult	Print		3100	Museum Pass	Other	Other
10	10110	24	Adult	Print		10000	Adult Generic	Adult	Print
11	10111	3	Adult	Print		10010	Adult Generic SF	Adult	Print
12	10120	0	Adult	Print		10034	Adult Reference	Adult	Print
13	10121	6,817	Adult	Print		10050	Adult Story Hour	Adult	Print
14	10122	366	Adult	Print		10070	Adult Opera	Adult	Print
15	10124	5	Adult	Print		10100	Adult Book	Adult	Print
16	10130	3	Adult	Print		10101	Adult Fiction	Adult	Print
17	10131	1	Adult	Print		10102	Adult Adventure	Adult	Print
18	10132	307	Adult	Print		10103	Adult Fantasy	Adult	Print

If you look over to the right side of the template now, you'll see the blue sections have been filled in! We've created formulas that automatically calculate your numbers from here on out.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	<b>ICODE1</b>	<b>Circulation</b>	<b>AUDIENCE</b>	<b>FORMAT</b>		<b>ICODE1</b>	<b>DESCRIPTION</b>	<b>AUDIENCE</b>	<b>FORMAT</b>		<b>Audience</b>	<b>Total</b>		
2	12600	1	Adult	Media		0	Bad Code	Other	Other		Adult	39505		
3	3100	39	Other	Other		10	Bad Code	Adult	Media		Juvenile	37936	Total	82483
4	10000	84	Adult	Print		43	Bad Code	Adult	Print		YA	5003		
5	10101	10,504	Adult	Print		94	Bad Code	Adult	Print		Other	39		
6	10103	3	Adult	Print		170	Bad Code	Adult	Print		<b>Format</b>	<b>Total</b>		
7	10106	3,146	Adult	Print		1121	Bad Code	Adult	Print		Media	19958		
8	10108	5	Adult	Print		3010	Bad Code	Juvenile	Print		Other	156	Total	82483
9	10109	7	Adult	Print		3100	Museum Pass	Other	Other		Print	62369		
10	10110	24	Adult	Print		10000	Adult Generic	Adult	Print					
11	10111	3	Adult	Print		10010	Adult Generic SF	Adult	Print					

These numbers should match

**THE END**