

Cheat Sheets of Circulation Reports

Attached are the cheat sheets which have been created by the Cooperative Circulation Committee and reviewed with the V-Cat Council to assist libraries in performing many of the tasks on the Timeline of regularly run circulation-related reports in Sierra.

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Getting Started with Create Lists

Under FUNCTION click CREATE LISTS. Once open, find an empty slot.

Review Files

File	Name	Current Records	Max Records	Type	Status
1	21 Day HD Adult	6	500	i	complete
2	lo processing	8	500	i	complete
3	Neillsville lost	24	500	i	complete
4	Granton Bills March	23	500	i	complete
5	14 to 28 February Hatley	107	500	i	complete
6	Loyal billed items	13	500	i	complete
7	M5 Feb. 2wk to 4wk	6	500	i	complete
8	m9 14 day to 28	100	500	i	complete
9	14 to 28 March Hatley	233	500	i	complete
10	Crandon New Materials	61	500	i	complete
11	TBS-Institution	145	500	p	complete
12	MI BILLED	234	500	i	complete
13		0	500		empty

Click SEARCH RECORDS on the top of the screen.

Review Files

File	Name	Current Records	Max Records	Type	Status	Login	Created [datetime]
1	21 Day HD Adult	6	500	i	complete	STccat	02-13-2014 / 17:07:52
2	lo processing	8	500	i	complete	LOccat	01-28-2014 / 11:24:13
3	Neillsville lost	24	500	i	complete	NEccat	02-06-2014 / 13:48:05
4	Granton Bills March	23	500	i	complete	GAccat	03-07-2014 / 11:31:48
5	14 to 28 February Hatley	107	500	i	complete	IMccat	02-03-2014 / 16:10:22
6	Loyal billed items	13	500	i	complete	GAccat	01-04-2014 / 11:02:49
7	M5 Feb. 2wk to 4wk	6	500	i	complete	M5ccat	02-17-2014 / 16:41:47
8	m9 14 day to 28	100	500	i	complete	M9ccat	02-21-2014 / 13:53:07
9	14 to 28 March Hatley	233	500	i	complete	IMccat	03-04-2014 / 11:48:14
10	Crandon New Materials	61	500	i	complete	CRccat	03-03-2014 / 11:07:40
11	TBS-Institution	145	500	p	complete	MRccat	03-06-2014 / 12:04:43
12	MI BILLED	234	500	i	complete	MIccat	03-06-2014 / 10:38:42
13		0	500		empty		

A box that looks like the one below should appear. Notice in the REVIEW FILE NAME, it says, "Antigo missing items." If you do not name your file, create lists will not let you search anything. Name your file using whatever status you're going to run the report for.

Boolean Search

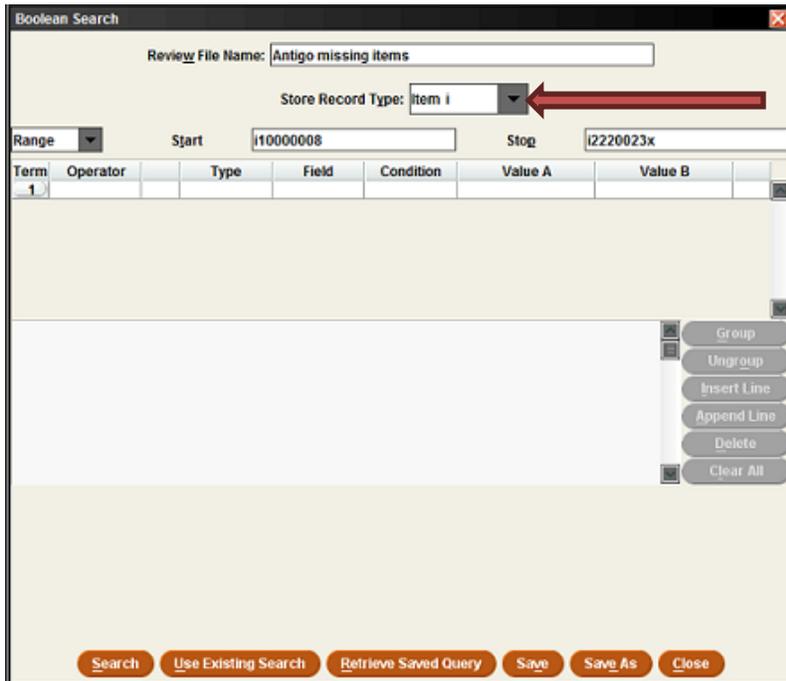
Review File Name:

Store Record Type:

Range:

Term	Operator	Type	Field	Condition	Value A	Value B
1						

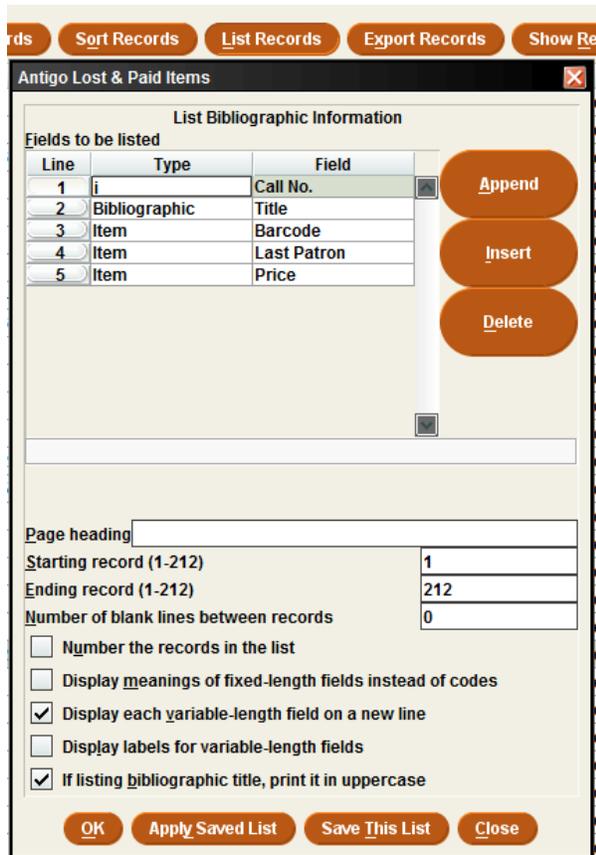
Next, make sure your STORE RECORD TYPE is set to item, or patron, depending upon what type of records you're looking for.



Once you have these first steps correct, you are ready to start entering your search criteria.

List Records

If you feel your list is going to be fairly short and you won't need to manipulate the data fields that much, you can simply list the records you've found. From the Review List, select the report you just created and click on **List Records**.



What criteria you enter here will depend on what you are looking for. Ask yourself what do I need in order to find, identify, cite, or display to give me the data I need?

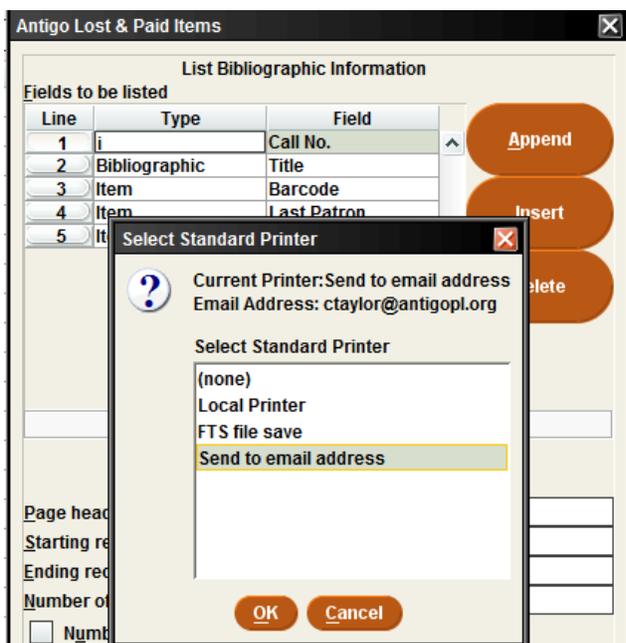
Depending on your list, you may need data from the bibliographic record, the item record, and/or the patron record.

Remember that the link that allows you to display both bibliographic and patron records is an item record. You can't create a list that contains only bibliographic and patron record data. Their link is the item record data, so be sure to create an **Item Store Record Type** if you're going to need data from both the bibliographic and patron records.

Use "Append" to put a new line below and "Insert" to put a new line above. Use "Delete" to delete the selected row.

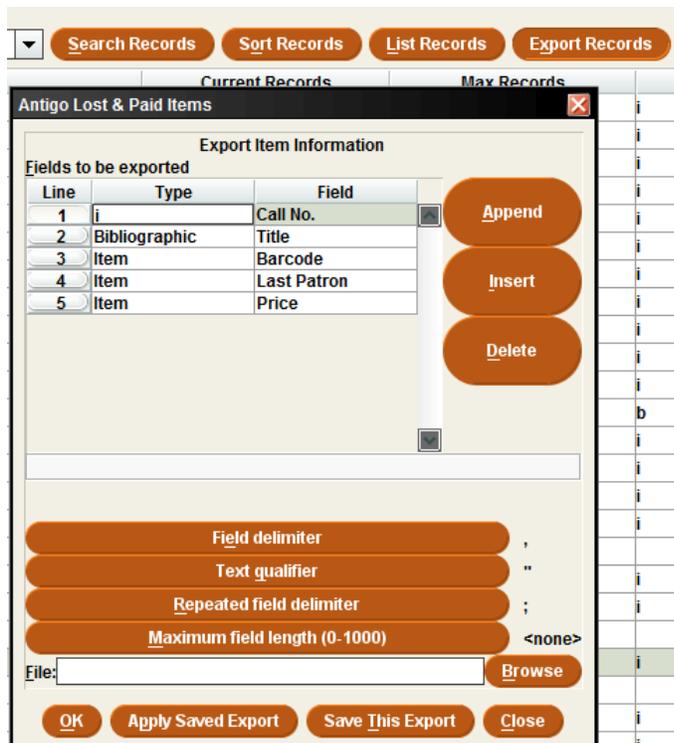
When you're sure you have what you need, you can either save the list or just click OK to send it either to your local printer or in an email.

You may find that you wish you had sorted the list or that it were arranged differently. There are times with a lengthy list, when it is much better to export the list into an Excel spreadsheet so that you can manipulate and format the list in different ways.



Export Records

There are many benefits to exporting the data so that you can manipulate it. You may have different uses for a list which include sorting it one way in one instance and another way for a different purpose. It may be a lengthy list so exporting it into a spreadsheet is far preferable.



From the list of review files, highlight the list you want to export, and click on **Export Records**,

Just as in List Records, you will need to know what data you wish to retrieve for the purpose intended, and this will depend entirely on what type of list you're creating.

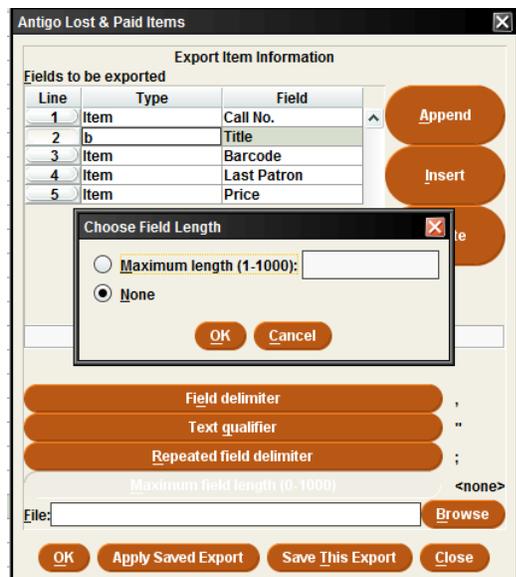
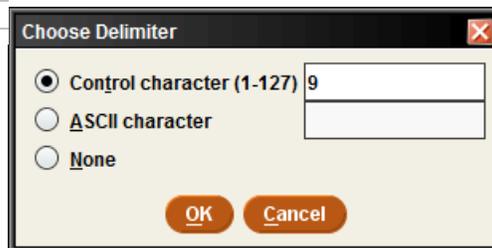
Use "Append" to put a new line below and "Insert" to put a new line above. Use "Delete" to delete the selected row.

Again, remember that an item record is the link between the bibliographic data and the patron data.

Enter your criteria.

Click on the **Field delimiter** and change it to Control character and enter 9 in this field.

You can ignore the **Text qualifier** and the **Repeated field delimiter**.

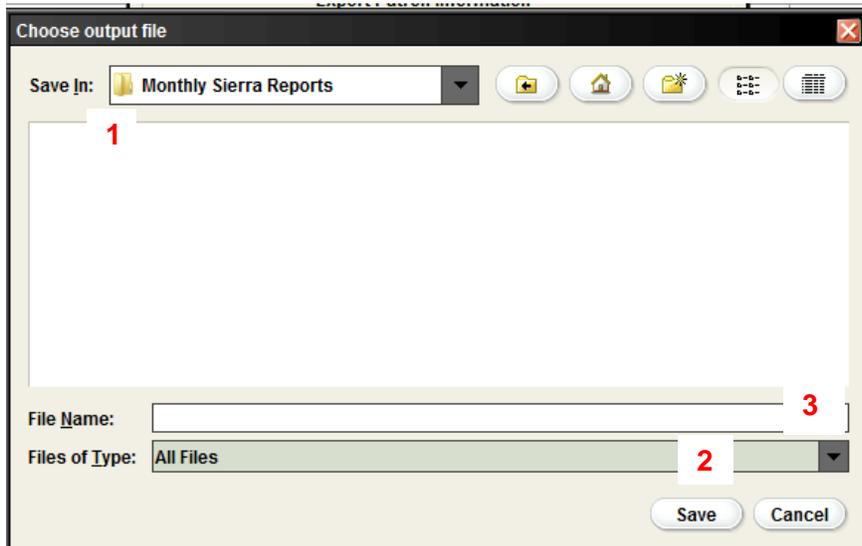


If you are including a lengthy field like a bibliographic title, you will want to limit its length.

First click on the field you wish to limit, and then click on **Maximum Field Length**.

Move the radio button to Maximum length, enter a figure (e.g. 30 is usually sufficient in a title field), and click OK.

Now you're going to want to tell Sierra where to send the file it's going to create. Most people don't know the full path to the location where they want the file to go, so click on **Browse**.



Most likely you will change the **Save In** location to your normal document folders (**#1**).

Then scroll to and click on the appropriate folder within that location.

Now you're ready to name the file.

Make sure that the **File Type** is All Files (**#2**).

If you want to save this file as an Excel spreadsheet, enter the file name followed by the extension: .xls (e.g. filename.xls). Then click on **Save (#3)**.

You can save the Export if you will frequently use it. If not, just click **OK**. The exporting is done, so you are returned to the Review File list.

Alternative File Type

Some like to save the file with a .csv extension. This is saving it as a "comma separated values" file. In that case, you do not need to alter the **Field Delimiter** to a 9, but just leave it as an ASCII Character. Then be sure to name the file with the .csv extension.

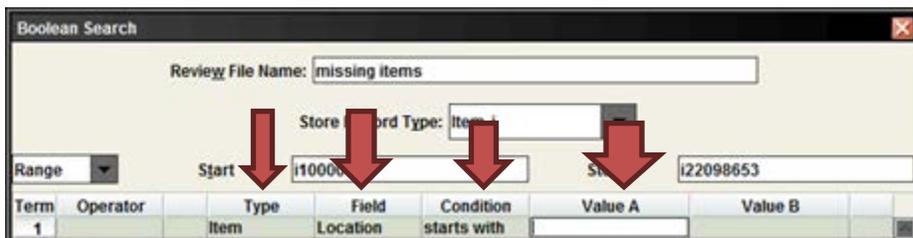
Be sure to Empty the review file you created.

Frequency: Monthly

Billed item report

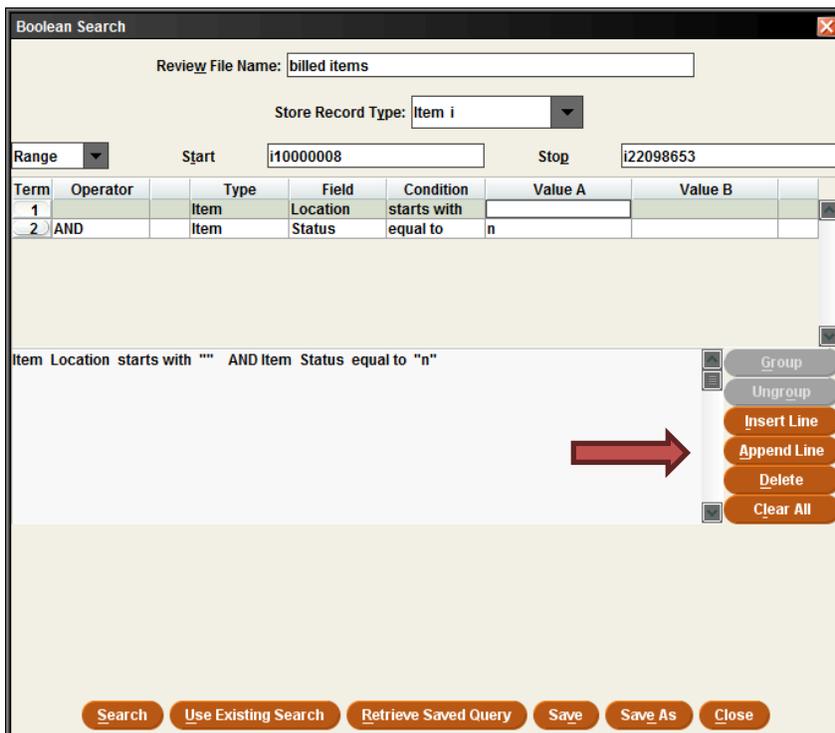
Rationale: These will reveal items which have not been returned so their status has changed to Billed automatically. You will probably want to look for the items again, contact the patrons, and start the procedure you may have for referral to the local police or a collection agency. If the item was checked out at a different library, you may need to create an invoice for that library if the item isn't returned by the patron.

Under **TYPE**, type an "i" for item.



Under **FIELD**, type "79" for Location.

Assuming you're looking for all of your libraries billed items, you can use "starts with" (^) under **CONDITION** and use the two letter code that indicates your library's locations under **VALUE A** (e.g.: Antigo = a1)



Once this is done, hit **APPEND LINE**. This will give you a second line to work with for your status.

Again, under **TYPE**, type an "i" for item.

Under **FIELD**, type 88 for status.

Under **CONDITION** type an = for equals to.

Under **VALUE A** type an "n" for billed.

When you have all of your search criteria, hit search.

Remember to Empty the list you have created once you have finished using or exporting it!

The procedures you follow at this point will depend on where the item was checked out. If checked out elsewhere, it is that lending library's responsibility to contact the patron. You may need to bill this library for its replacement eventually.

For those items for which you will send an invoice to the circulating library, remember NOT to bill before at least 30 days from the OVERDUE DATE. This is the date that a bill for replacement was sent.

id: 12-12-2012 Revisions: 20

Inventory Date	- -	Location	m1af MCPL Wausau Adult Fiction
Checkin Location	690	Loanrule	299
No. of Renewals	1	Status	n Billed
No. of Overdues	3	Internal Use	0
Overdue Date	05-12-2014	Copy Use	0
Item Use 3	0	Item Message	- No Message
Recall Date	- -	OPAC Message	- ---
Total Checkouts	10	Year-to-Date Circ	1
Total Renewals	1	Last Year Circ	3
Last Checkout Date	12.02.2013 12:11PM	Item Agency	11 Marathon

Edit Mode (INS)

Remember you can wait more than 30 days before issuing an invoice, but it must be within 60 days of the last OVERDUE DATE. The circulating library has 60 days in which to pay the invoice from the date of the invoice.

V-Cat Template

The screenshot shows the 'Boolean Search' window with the following fields and controls:

- Review File Name:
- Store Record Type:
- Range: Start Stop
- Table with columns: Term, Operator, Type, Field, Condition, Value A, Value B
- Table content:

Term	Operator	Type	Field	Condition	Value A	Value B
1						
- Buttons on the right: Group, Ungroup, Insert Line, Append Line, Delete, Clear All
- Buttons at the bottom: Search, Use Existing Search, Retrieve Saved Query, Save, Save As, Close

You can use the system-wide template for this report, called **V-CAT Billed Items**. To access this saved query, click on an empty review file slot in the Create Lists function, and click on **Retrieve Saved Query** button.

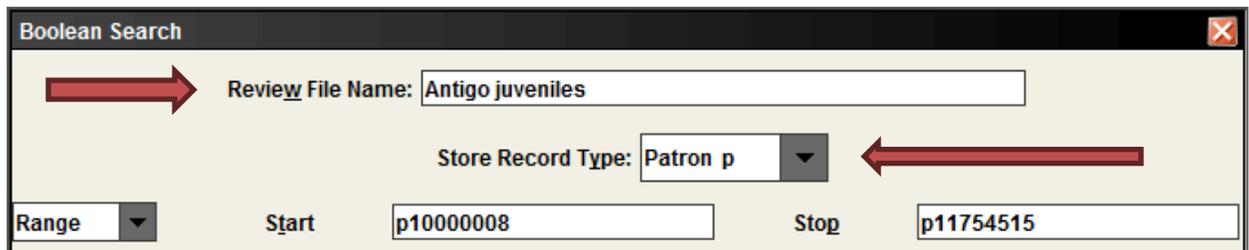
A list of queries will be displayed. Scroll down to find this template name and click Select. Then modify the parameters as needed. There is no need to Save this query again.

Frequency: Monthly

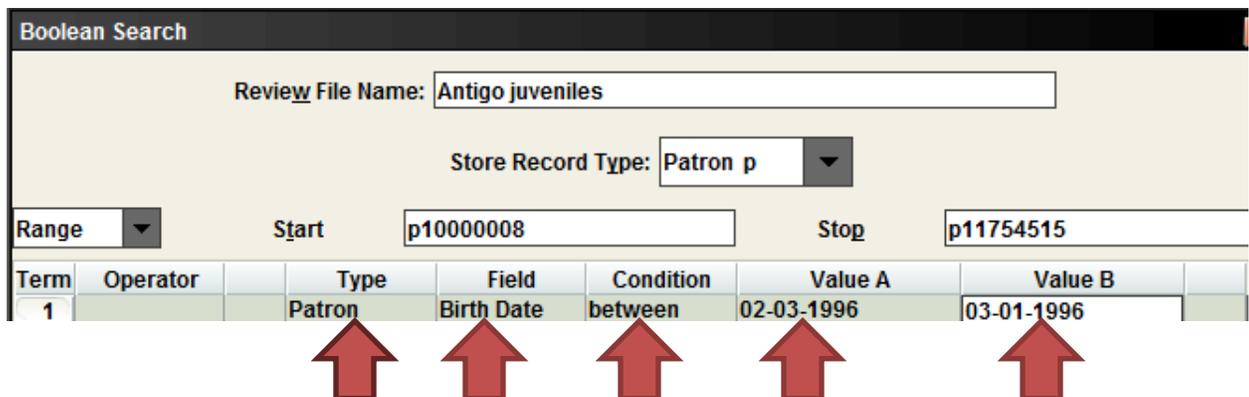
Changing juveniles to adults

Rationale: Many loan rules are guided by patron type so that juveniles and adults are treated differently. We also need current ID data.

- 1) Name review file
- 2) Change STORE RECORD TYPE to patron



- 3) Under **TYPE**, type "p" for patron
 Under **FIELD**, type 51 for birth date
 Under **CONDITION**, type W for between
 Under **VALUE A** type the month/day/year that you want your search to begin (ie: 02-01-1996)
 Under **VALUE B** type the month/day year that you want your search to end (ie: 3-01-1996)



NOTE: If you do create this report every month, then you can limit the dates in Value A and Value B to a one-month range. However, if you don't run this monthly (or haven't done this for a longer period), we recommend that you make the **CONDITION** less than or equal to, and make **VALUE A** the most recent birthdate month when your juveniles would now be classified as adults.

- 4) Hit APPEND LINE. This will give you a second line to work with your patron type.

Boolean Search

Review File Name: Antigo juveniles

Store Record Type: Patron p

Range: Start: p10000008 Stop: p11754515

Term	Operator	Type	Field	Condition	Value A	Value B
1		Patron	Birth Date	between	02-03-1996	03-01-1996
2	AND	Patron	Patron Type	equal to		

Patron Birth Date between "02-03-1996"and " - - " AND Patron Patron Type equal to ""

Buttons: Group, Ungroup, Insert Line, Append Line, Delete, Clear All

Buttons: Search, Use Existing Search, Retrieve Saved Query, Save, Save As, Close

- 5) Under **TYPE**, type "p" for patron
 Under **FIELD**, type 47 for patron type
 Under **CONDITION**, type = for equal to
 Under **VALUE A** type the juvenile patron code for your library.

Boolean Search

Review File Name: Antigo juveniles

Store Record Type: Patron p

Range: Start: p10000008 Stop: p11754515

Term	Operator	Type	Field	Condition	Value A	Value B
1		Patron	Birth Date	between	02-03-1996	03-01-1996
2	AND	Patron	Patron Type	equal to		

Patron Birth Date between "02-03-1996"and " - - " AND Patron Patron Type equal to ""

Buttons: Group, Ungroup, Insert Line, Append Line, Delete, Clear All

Buttons: Search, Use Existing Search, Retrieve Saved Query, Save, Save As, Close

- 6) OPTIONAL: If your library has branches, you will probably want to APPEND another line, using AND, and add a patron AGENCY field equal to your agency number. That way you will find the juveniles in your main library and all branches.
- 7) When you have all of your search criteria, hit search.



Remember to Empty the list you have created once you have finished using or exporting it!

NOTE: Be sure to add a message to these patron records, noting that staff should acquire a new ID for the record. Once you have this ID, we recommend that you remove the guardian name and guardian ID.

V-Cat Template

Review File Name:

Store Record Type: Patron p

Range: Start Stop

Term	Operator	Type	Field	Condition	Value A	Value B
1						

Group
Ungroup
Insert Line
Append Line
Delete
Clear All

Search Use Existing Search Retrieve Saved Query Save Save As Close

You can use the system-wide template for this report, called **V-CAT Juveniles to Adults**. To access this saved query, click on an empty review file slot in the Create Lists function, and click on **Retrieve Saved Query** button.

A list of queries will be displayed. Scroll down to find this template name and click Select. Then modify the parameters as needed. There is no need to Save this query again.

Frequency: Monthly

In processing report

Rationale: This will enable you to find records for those items which accidentally went out on the shelf for circulation without the status being changed to “available.”

Under **TYPE**, type an “i” for item.

Under **FIELD**, type “79” for Location.

If you’re looking for this status in your entire library, you can use “starts with” (^) under **CONDITION** and use the two letter code that indicates your library’s locations under **VALUE A** (e.g.: Antigo = a1).

Review File Name: Antigo items in processing

Store Record Type: Item i

Range Start i1000000 Stop i22200332

Term	Operator	Type	Field	Condition	Value A	Value B
1		i	Location	starts with		

There is no Value B.

Once this is done, hit **APPEND LINE**. This will give you a second line to work with for your status.

Review File Name: Antigo items in processing

Store Record Type: Item i

Range Start i10000008 Stop i22200332

Term	Operator	Type	Field	Condition	Value A	Value B
1		i	Location	starts with		
2	AND	Item	Status	equal to	i	

Item Location starts with "" AND Item Status equal to "i"

Group
Ungroup
Insert Line
Append Line
Delete
Clear All

Again, under **TYPE**, type an “i” for item.

Under **FIELD**, type 88 for status.

Under **CONDITION** type an = for equals to.

Under **VALUE A** type an “i” for in processing.

Boolean Search

Review File Name:

Store Record Type:

Range Start Stop

Term	Operator	Type	Field	Condition	Value A	Value B
1		i	Location	starts with		
2	AND	Item	Status	equal to	i	

(Four red arrows point to the 'i' in 'i', 'Item', 'Status', and 'i' in the table rows.)

When you have all of your search criteria, hit search.

(A red arrow points down to the Search button.)

Remember to Empty the list you have created once you have finished using or exporting it!

V-Cat Template

Boolean Search

Review File Name:

Store Record Type:

Range Start Stop

Term	Operator	Type	Field	Condition	Value A	Value B
1						

(A vertical toolbar on the right side of the table contains buttons: Group, Ungroup, Insert Line, Append Line, Delete, Clear All.)

You can use the system-wide template for this report, called **V-CAT In Processing Items**. To access this saved query, click on an empty review file slot in the Create Lists function, and click on **Retrieve Saved Query** button.

A list of queries will be displayed. Scroll down to find this template name and click Select. Then modify the parameters as needed. There is no need to Save this query again.

Frequency: Monthly

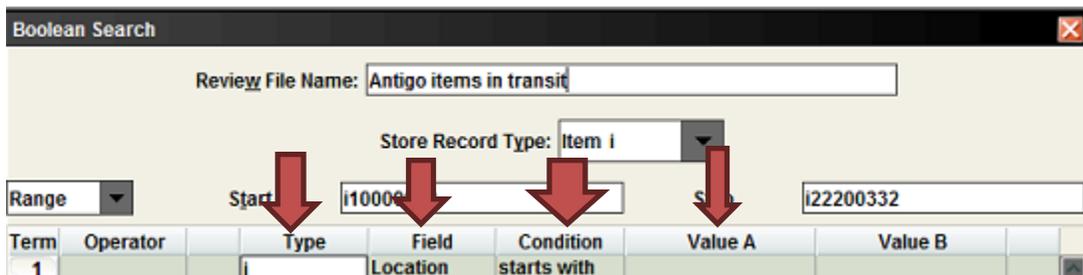
In transit report

Rationale: Try as hard as we can, items get directed to the wrong location or get lost in the courier network. It's important to follow up on the items that are "in transit" too long and determine where they are.

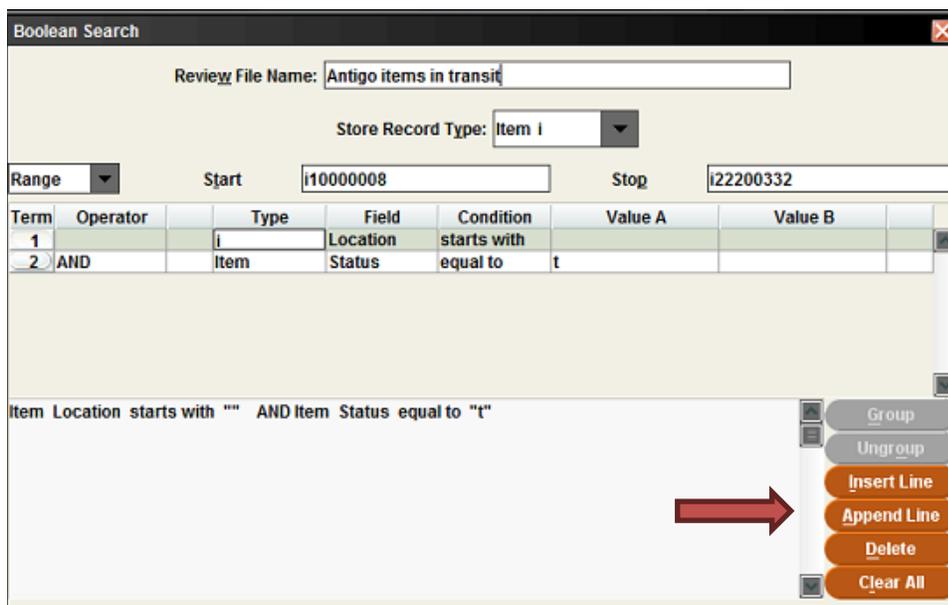
Under **TYPE**, type an "i" for item.

Under **FIELD**, type "79" for Location.

If you're looking to find what's in transit for your entire library, you can use "starts with" (^) under **CONDITION** and use the two letter code that indicates your library's locations under **VALUE A** (e.g.: Antigo = a1).



Once this is done, hit **APPEND LINE**. This will give you a second line to work with for your status.



Again, under **TYPE**, type an "i" for item.

Under **FIELD**, type 88 for status.

Under **CONDITION** type an = for equals to.

Under **VALUE A** type an "t" for in transit.

Boolean Search

Review File Name: Antigo items in transit

Store Record Type: Item i

Range: Start: i10000008 Stop: i22200332

Term	Operator	Type	Field	Condition	Value A	Value B
1		i	Location	starts with		
2	AND	Item	Status	equal to	t	

Four red arrows point to the 'Item', 'Status', 'equal to', and 't' fields in the second row of the search criteria table.

When you have all of your search criteria, hit search.

Search Use Existing Search Retrieve Saved Query Save Save As Close

A red arrow points down to the 'Search' button.

Now that you've identified the items, you need to follow up to try to locate them. What library did they most recently leave via courier and where were they headed?

Remember to Empty the list you have created once you have finished using or exporting it!

V-Cat Template

Boolean Search

Review File Name:

Store Record Type: Item i

Range: Start: i10000008 Stop: i22424234

Term	Operator	Type	Field	Condition	Value A	Value B
1						

Group
Ungroup
Insert Line
Append Line
Delete
Clear All

Search Use Existing Search Retrieve Saved Query Save Save As Close

You can use the system-wide template for this report, called **V-CAT In Transit Items**. To access this saved query, click on an empty review file slot in the Create Lists function, and click on **Retrieve Saved Query** button.

A list of queries will be displayed. Scroll down to find this template name and click Select. Then modify the parameters as needed. There is no need to Save this query again.

Frequency: Monthly

Items coming off of high demand

Rationale: We've all agreed that items will only stay on high demand for a maximum of 4 months, except under very rare circumstances. Since some of these items are probably in circulation, it's easier to create a list to identify those items which should come off high demand rather than just try to find the item on your new item shelves.

However, those libraries which create item records for their "on order" items cannot use the creation date in Sierra as their sole guide.

Under **TYPE**, type an "i" for item.

Under **FIELD**, type "79" for Location.

Under **CONDITION** and **VALUE A** you have options. If you're looking for a certain location, say new adult fiction, you can use "equal to" in **CONDITION**, and type in the location code (e.g.: a1afn) under **VALUE A**. If you're looking to find what's in high demand in your entire library, you can use "starts with" (^) under **CONDITION** and use the two letter code that indicates your library's locations under **VALUE A** (e.g.: Antigo = a1).

Term	Operator	Type	Field	Condition	Value A	Value B
1		Item	Location	starts with		

Once this is done, hit **APPEND LINE**. This will give you a second line to work with for your created date.

Term	Operator	Type	Field	Condition	Value A	Value B
1		Item	Location	starts with		
2	AND	Item	Created Date	less than	02-02-2013	-
3	AND	Item	Item Type	equal to	14	

Again, under **TYPE**, type an "i" for item.

Under **FIELD**, type 83 for created date.

Under **CONDITION** type an <= for less than or equal to

Under **VALUE A** type three months prior to the date you're running the report (e.g.: 12/1/13).

Hint: It's easier to use the beginning of a month, that way you have less chance of missing any items.

Boolean Search

Review File Name: High Demand

Store Record Type: Item i

Range: Start: i1000008 Stop: i22098653

Term	Operator	Type	Field	Condition	Value A	Value B
1		Item	Location	starts with		
2	AND	Item	Created Date	less than	02-02-2013	- -

STOP: If you used “equals to” in **CONDITION**, you may hit search!

If you used “starts with” in **CONDITION, you will need to hit APPEND LINE again.**

Boolean Search

Review File Name: High Demand

Store Record Type: Item i

Range: Start: i1000008 Stop: i22098653

Term	Operator	Type	Field	Condition	Value A	Value B
1		Item	Location	starts with		
2	AND	Item	Created Date	less than	02-02-2013	- -
3	AND	Item	Item Type	equal to	14	

Item Location starts with "" AND Item Created Date less than "02-02-2013" AND Item Item Type equal to "14"

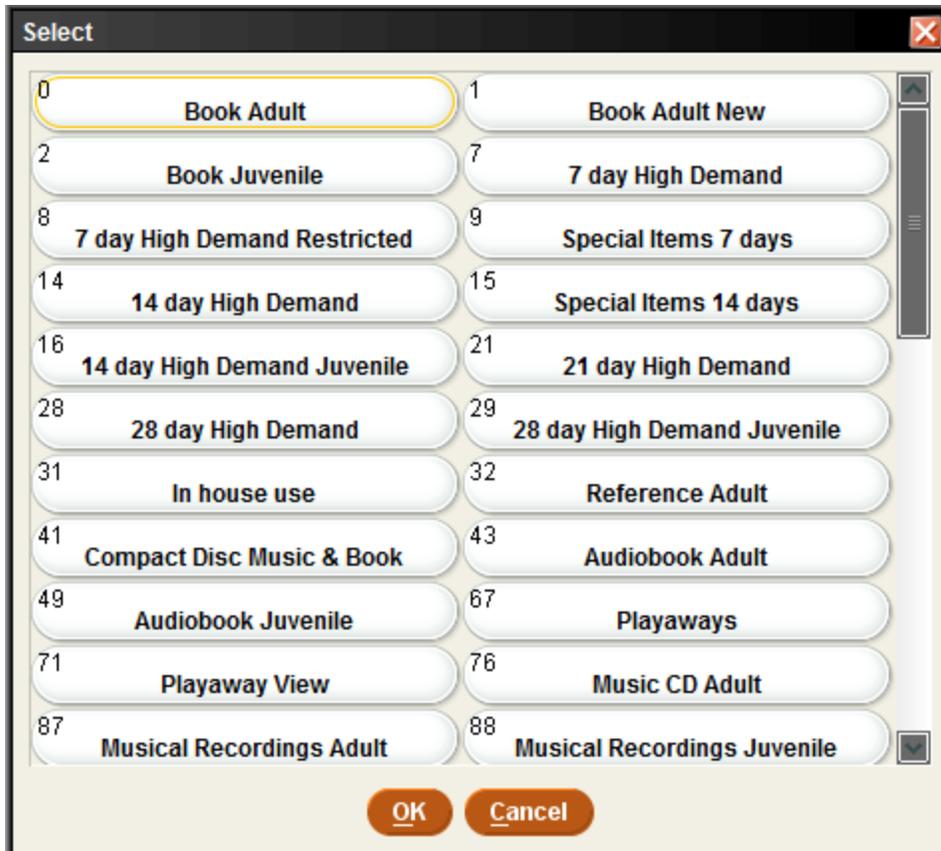
Group
Ungroup
Insert Line
Append Line
Delete
Clear All

Again, under **TYPE**, type an “i” for item.

Under **FIELD**, type 61 for item type.

Under **CONDITION** type an = for equal to.

Under **VALUE A** type whatever code you use for high demand items. A list of item types is below.



When you have all of your search criteria, hit search.



Remember to check these items in after you have taken them off high demand. There may be holds on them from patrons from other libraries, and this is the only way to be sure the holds are activated.

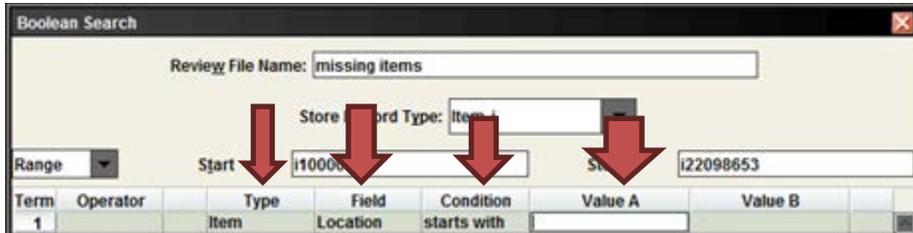
Remember to Empty the list you have created once you have finished using or exporting it!

Frequency: Monthly

Lost and paid item report

Rationale: You need to determine if you will replace these items or mark their records for deletion. This procedure retrieves the records so that you can make this determination.

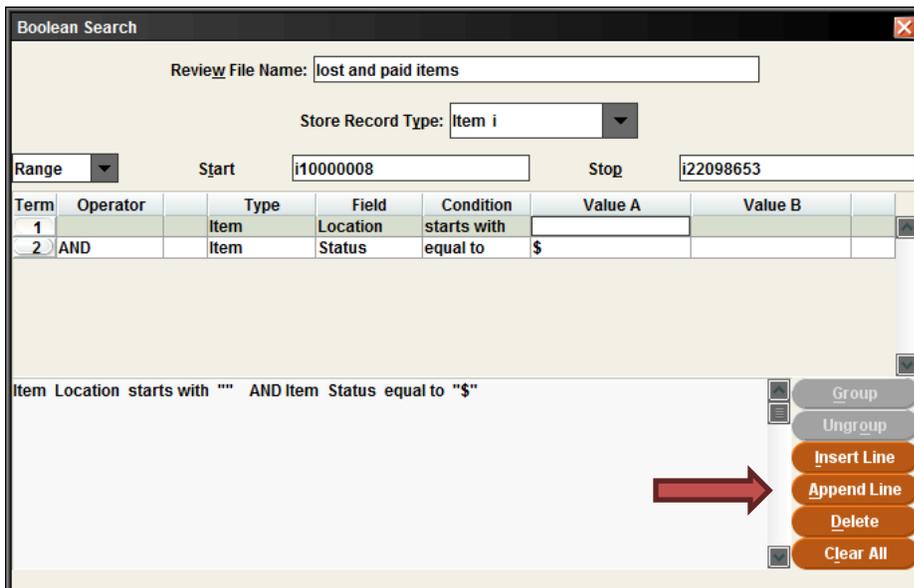
Under **TYPE**, type an “i” for item.



Under **FIELD**, type “79” for Location.

Assuming you’re looking for all of your library’s lost and paid items, you can use “starts with” (^) under **CONDITION** and use the two letter code that indicates your library’s locations under **VALUE A** (e.g.: Antigo = a1)

Once this is done, hit **APPEND LINE**. This will give you a second line to work with for your status.



Again, under **TYPE**, type an “i” for item.

Under **FIELD**, type 88 for status.

Under **CONDITION** type an = for equals to.

Under **VALUE A** type an “\$” for lost and paid.

When you have all of your search criteria, hit search.

Note: For those item records which you are going to retain in Sierra, remember to change the first four digits of their barcodes to: LOST (Only the owning library makes this change to the item barcode.)

That way, if the item is returned somewhere, it won't trigger a refund. It will no longer be scannable.

You will determine from this list what items you wish to replace with an identical new copy, which are obsolete and you wish to replace with something newer, and which you will not replace at all and, therefore, mark the item record for deletion.

For those items which have been paid for by another library's patron and the money collected by another library, issue an invoice for this item to the circulating library which collected the funds. Many libraries wait to delete the item record until this invoice is paid.

Remember to Empty the list you have created once you have finished using or exporting it!

V-Cat Template

The screenshot shows the 'Boolean Search' window with the following fields and controls:

- Review File Name:
- Store Record Type:
- Range: (dropdown arrow)
- Start:
- Stop:
- Table with columns: Term, Operator, Type, Field, Condition, Value A, Value B
- Table content:

Term	Operator	Type	Field	Condition	Value A	Value B
1						
- Buttons on the right: Group, Ungroup, Insert Line, Append Line, Delete, Clear All
- Buttons at the bottom: Search, Use Existing Search, Retrieve Saved Query, Save, Save As, Close

You can use the system-wide template for this report, called **VCAT Lost & Paid Items**. To access this saved query, click on an empty review file slot in the Create Lists function, and click on **Retrieve Saved Query** button.

A list of queries will be displayed. Scroll down to find this template name and click **Select**. Then modify the parameters as needed. There is no need to Save this query again.

Frequency: Monthly

Missing item report

Rationale: For various reasons, you marked items you couldn't find as "missing." It's important to retrieve these records so that you can search for them again and determine if you will mark the records for deletion or order a replacement.

Under **TYPE**, type an "i" for item

Under **FIELD**, type "79" for Location.

Under **CONDITION** and **VALUE A** you have options. If you're looking for a certain location, say adult fiction, you can use "equal to" in **CONDITION**, and type in the location code (ie: a1af) under **VALUE A**. If you're looking to find what's missing in your entire library, you can use "starts with" (^) under **CONDITION** and use the two letter code that indicates your library's locations under **VALUE A** (e.g.: Antigo = a1).

The screenshot shows a 'Boolean Search' window with the following fields and values:

- Review File Name: missing items
- Store: [blank]
- Word Type: Item
- Start: i10000
- Stop: i22098653

Term	Operator	Type	Field	Condition	Value A	Value B
1		Item	Location	starts with		

Four red arrows point to the 'Type', 'Field', 'Condition', and 'Value A' columns in the table above.

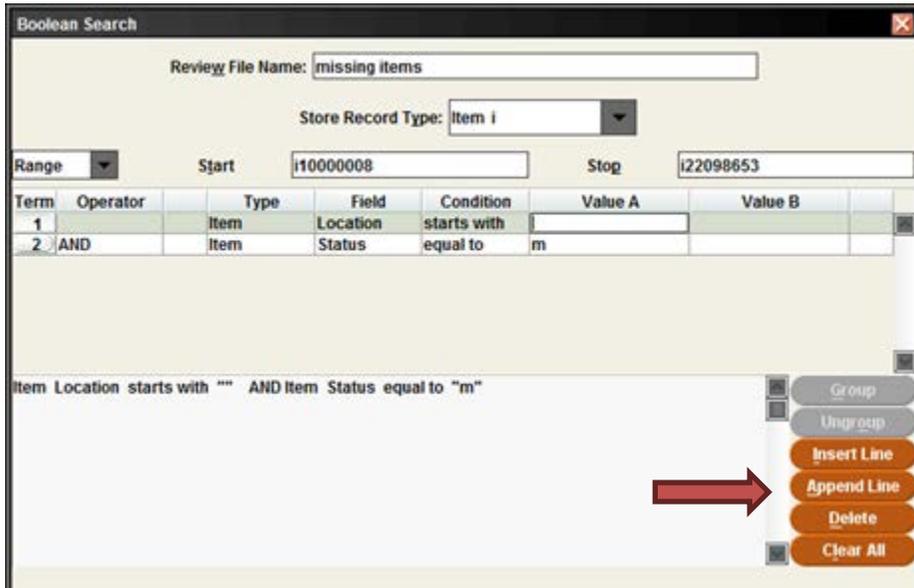
A list of selections to use under **CONDITION** is below.

The 'Select' dialog box contains the following search conditions:

- greater than
- less than
- greater than or equal to
- not within
- has
- At Least one Field doesn't have
- starts with
- equal to
- not equal to
- less than or equal to
- between
- All Fields don't have
- matches
- ends with

Buttons for 'OK' and 'Cancel' are at the bottom.

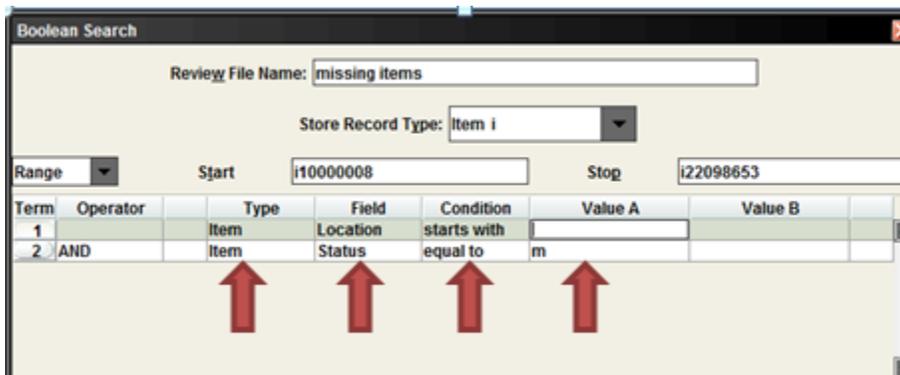
Once this is done, hit **APPEND LINE**. This will give you a second line to work with for your status.



Again, under **TYPE**, type an "i" for item. Under **FIELD**, type 88 for status.

Under **CONDITION** type an = for equals to.

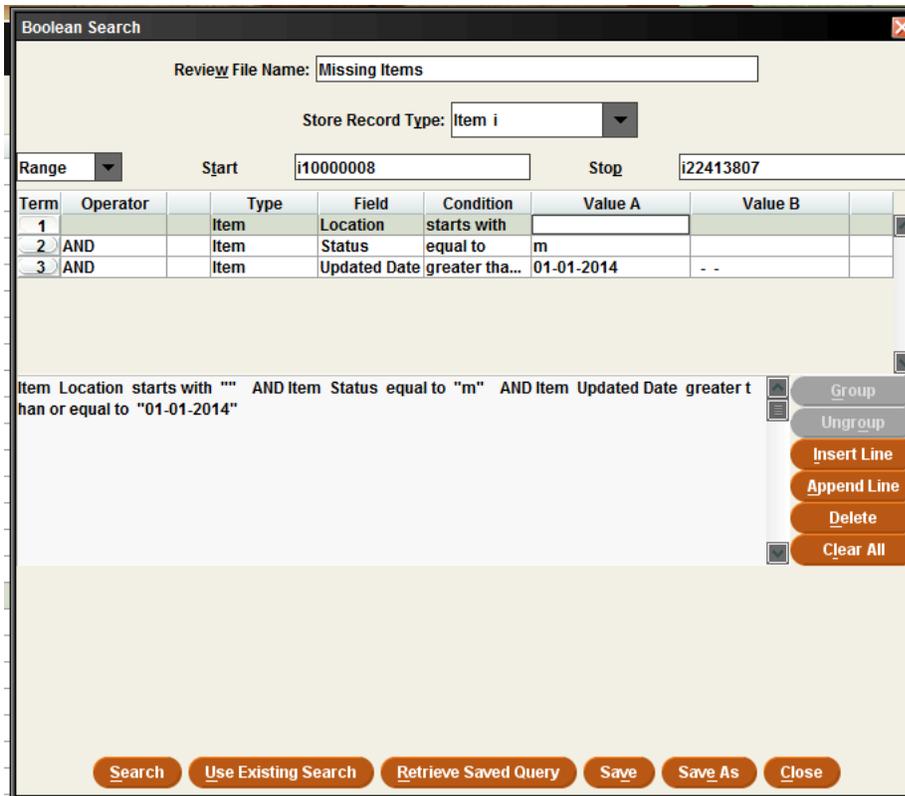
Under **VALUE A** type an "m" for missing.



When you have all of your search criteria, hit search.

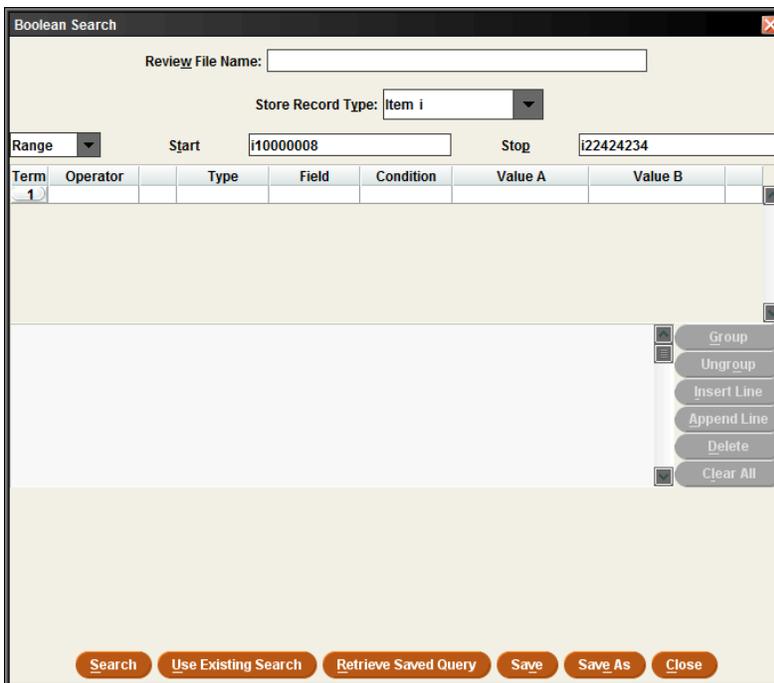


Given your volume of items which may have this status, you can also limit the search by using the Last Updated Date. However, in order for this to be useful, you will want to run this report on a monthly basis. Every time an item record is modified by any one, this date changes.



Remember to Empty the list you have created once you have finished using or exporting it!

V-Cat Template



You can use the system-wide template for this report, called **VCAT Missing Items**. To access this saved query, click on an empty review file slot in the Create Lists function, and click on **Retrieve Saved Query** button.

A list of queries will be displayed. Scroll down to find this template name and click Select. Then modify the parameters as needed. There is no need to Save this query again.