**Walkthrough of the YTD update process**

*Revised* for Sierra 3.0

M.Massicotte, August 2017

*Regardless of other system settings and options, the* ***YTDCIRC*** *field contains the total cumulative circulations for the statistical period in question--that is, for the time period accumulating since the last reset of the YTDCIRC counter field -- including Reserves circulations that were done during said period.*

By contrast, the TOT CHKOUT field contains: The total number of circulations for the life of the item as circulated from the regular collection. *There is an important exception to this:*

1. When any item is placed on reserve, the system *moves* the contents of the **TOT CHKOUT** field to the body of the item record. The stored history is protected in a view-only mode (appears grayed-out).

2. The system then resets the **TOT CHKOUT** field to zero. The **TOT CHKOUT** field now represents the number of RESERVE circulations. The first checkout of the item while it's on reserve will now register a "1" in the TOT CHKOUT field. The TOT CHKOUT field will continue to increment for each circulation during the time span that the material remains on reserve.

3. Once the item is taken OFF reserve, the content of the **TOT CHKOUT** field reverts to the previous value, and the stored history (grayed-out portion) is simultaneously removed by the system.

4. All regular circulation data (#1), plus all reserves circulation (#2), are accumulated in the YTDCIRC field.

**PROCEDURE FOR ANNUAL YTD RESET**

1. Run the SCAT report for the period covered. This is done in Web Management Reports in Sierra. Select Circulation Statistics, “Checkout Activity”, and “U user specified year”. Choose the S> System Report, and select CALL NUMBER REPORT. (the CALL NUMBER report is the Scat). Select the period to cover, starting with month/year (usually August of the previous calendar year) to the current month. Make sure the report covers the desired period by verifying the header at the top of the report.
2. After the SCAT report is completed, download the data to PC. The file will need to be parsed into columns by converting the |.
3. Send out email to staff to alert them that preparations for the reset are underway.
4. Updating the YTDCIRC counter in the item record must be done in character based system, using the **Rapid Update** function in Catalog Database Maintenance module. Specify item records will be updated. [Sierra Web manual refers to this as Rapid Update for YTD, but on our system, it is simply Rapid Update].
5. **Rapid Update** function will ask if maintenance of the YTD is being done; answer **YES**.
6. System asks if we wish to *zero out* the current YTD?: answer **YES**.
7. System gives a choice as to whether we want to ADD the contents to the existing LYR **OR** to *Replace* LYRCIRC with the number currently in the YTDCIRC field. **Choose the option to Replace LYRCIRC with the number currently in the YTD**.
8. System asks if we wish to update records in a review file -- answer NO. (We want to replace all of our item YTD fields in this exercise, not just some of them).
9. System then prompts for record range. Start at .i10000008. For the end of range, press Return. System supplies last record number and asks for confirmation. Ok it.
10. Finally, you are prompted to confirm that all settings are correct. It is still possible to QUIT at this point. Confirm YES, settings are correct.
11. The update commences immediately, and takes about 5 minutes. To tell if the process is running, look at the bib record number on the screen, which will increment itself occasionally.
12. Process ends when system reports:

[X] number of updates have been done. Please do a full backup as soon as possible. [we do full backups nightly].

13. Send out a confirmation email that the YTD counter has been reset.

13. SCAT report should be downloaded, parsed, and sent to AUL Collections for storing on the wiki.