



CREATE LISTS WITH MILLENNIUM I Basic

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Content

- Introduction
- Tools you require
- Boolean expressions
- Basic layout of screen
- Create list process
 - View, Edit, Sort
- List (print or e-mail)
- Examples
- Questions



Introduction

- Create lists are stored in a review file
 - (Review files only contain record no's of database records)
- Lists based on own criteria/needs
- Can combine data from different record types
- From the review file, the records can be:
 - Displayed on screen
 - Sorted
 - Edited
 - Printed/exported
 - Used to global/rapid update data



Tools you require

- Authorised for create lists
- Knowledge/understanding of
 - Boolean operators & expressions
 - Indexes & fields
 - Create list procedure
 - Manipulation of data in review file

*Create lists modes are available in all major modules

**If you are authorised*



Boolean expressions

And Contains both values specified

eg. ptype=1 **and** ptype=2 (retrieves both ptype's)

OR Contains one of the values specified

eg. ptype=1 **or** ptype=2 (retrieves only ptype 1 or 2)

AND & OR

Used only for adding multiple search lines (using append)



Boolean expressions

- =** Equal to (exact match)
eg. ptype = 1 (retrieves only ptype 1)
- !=** Not equal to
eg. ptype !=1 (retrieves all ptype's except ptype 1)
- >** Greater than
eg. ptype > 5 (retrieves ptype 6 + higher)
- >=** Greater equal
eg. ptype >=5 (retrieves ptype 5 + higher)



Boolean expressions

- <** Less than
eg. ptype **< 5** (retrieves ptype **4** + lower)
- <=** Less or equal
eg. ptype **<=5** (retrieves ptype **5** + lower)
- Has** Exact match for value entered
eg. ptype field z **has @** (retrieves patrons with e-mail addresses)

Elaborated description in Manual # 101608



Basic layout of screen

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File Edit View Go Tools Admin Reports Help

Create Lists

Ensure "Review files" is selected

To start search

Display your list on the screen

Displays your search strategy

Select data to export to spreadsheet

Review Files Saved Searches

All Search Records List Records

Show Records Show Info

Export Records

File	Name	Current Reco...	Max Records	Type	Status	Initials	Created [date/tim...
103	"Library has" CSIR#pdv#20-03-...	2526	10000	b	complete		
109	2001 Tydskrifafskrywings gb	10	10000	o	complete		
108	2002 afskrywings gb	336	10000	b	complete		
96	2checkin HM 30/5	2862	10000	c	complete		
83	Africana Jun-Aug 2006	100	5000	i	complete	ajl	11-09-2006 / 07:5...
112	AJ CSIR e-mails 21/9/06	85	25000	p	complete	aj	21-09-2006 / 09:4...
19	ajl 528	283	10000	b	complete	ajl	16-10-2006 / 14:5...
24	ajl coldev 581	1341	5000	b	complete	ajl	16-10-2006 / 14:5...
18	ajl csir overdue - AIC books	30	10000	p	complete	ajl	29-09-2006 / 15:4...
29	ajl e-reserves 2001/2 with pdf	1321	5000	b	complete	ajl	30-09-2006 / 15:2...
2	ajl expired patrons	8739	60000	p	complete	ajl	16-10-2006 / 15:2...
99	ajl swartlys okt 06	1866	10000	p	complete	ajl	17-10-2006 / 12:1...
16	ajl url	136	10000	b	complete	ajl	20-10-2006 / 09:3...
85	ajl xml	8	5000	b	complete	ajl	21-07-2006 / 07:4...
1	ajl ytdcirc	47411	60000	i	complete	ajl	29-09-2006 / 15:1...
40	be156 Hw/ 2006/10/19	26	5000	o	complete		
69	Bibs: call numbers not in SCAT(...	618	5000	b	complete		03-10-2006 / 12:2...
62	BioChemtek books	508	5000	i	complete		



Basic layout of screen

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File Edit View Go Tools Admin Reports Help

Create Lists Functions

Append Dedupe Copy Empty Rename Resume Stop Suspend Settings

Millennium

Create Lists

Statistics

Web Options

Web Master

Data Exchange

Name of your file eg. Initials + brief description

Number of retrieved records search

Maximum no. records

Indicates the type of records generated

Initials - System initials

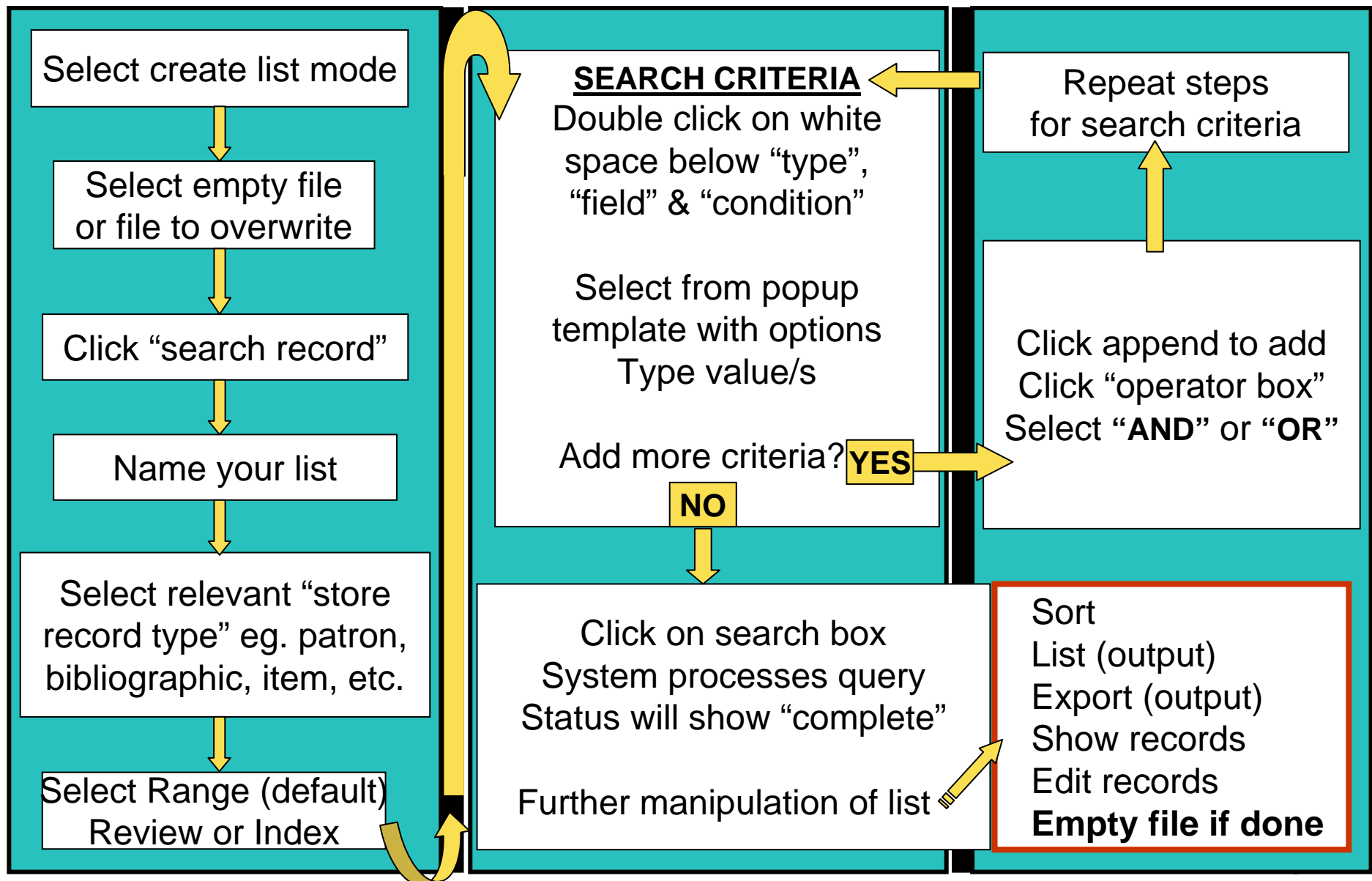
Date generated

File	Name	Current Reco...	Max Records	Type	Status	Initials	Created [date/tim...
103	"Library has" CSIR/pdv#20-03-...	2526	10000	b	complete		
109	2001 Tydskrifafskrywings gb	10	10000	o	complete		
108	2002 afskrywings gb	226	10000	b	complete		
96	2checkin HM 30/5			c	complete		
83	Africana Jun-Aug 2006			i	complete	ajl	11-09-2006 / 07:5...
112	AJ CSIR e-mails 21/9/06			p	complete	aj	21-09-2006 / 09:4...
19	ajl 528			b	complete	ajl	16-10-2006 / 14:5...
24	ajl coldev 581			b	complete	ajl	16-10-2006 / 14:5...
18	ajl csir overdue - AIC books			p	complete	ajl	29-09-2006 / 15:4...
29	ajl e-reserves 2001/2 with pd			b	complete	ajl	30-09-2006 / 15:2...
2	ajl expired patrons			p	complete	ajl	16-10-2006 / 15:2...
99	ajl swartlys okt 06			p	complete	ajl	17-10-2006 / 12:1...
16	ajl url			b	complete	ajl	20-10-2006 / 09:3...
85	ajl xml			b	complete	ajl	21-07-2006 / 07:4...
1	ajl ytdcirc	47411	60000	i	complete	ajl	29-09-2006 / 15:1...
40	be156 HvW/ 2006/10/19	26	5000	o	complete		
69	Bibs: call numbers not in SCAT(...	618	5000	b	complete		03-10-2006 / 12:2...
62	BioChemtek books	508	5000	i	complete		

File type eg.
b=bibliographic
i=item
p=patron
o=order



Basic create list process





Creating a list for:

- Patrons owing more than R20
AND
- Patrons with overdue books prior to 30/10/06



Create a list

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File Edit View Go Tools Admin Reports Help

Create Lists Functions

3. Click search records

1. Select create mode

2. Click once on empty review file (it will highlight)
Select a review file with a file size according to expected results

File	Name	Current Reco...	Max Records	Type	Status	Initials	Created [date/tim...
15	taylor	123	10000	b	complete		
16	HSS TYDSKRIFTE agr	24	10000	b	complete	hs	27-10-2006 / 12:1...
17	swetslaw	119	10000	o	complete		
18	ajl csir overdue - AIC books	30	10000	p	complete	ajl	29-09-2006 / 15:4...
19	ajl 528	283	10000	b	complete	ajl	24-10-2006 / 13:2...
20	Empty	0	10000		empty		
21	Empty	0	10000		empty		
22	henta boeke	52	5000	o	complete	rm	26-09-2006 / 14:4... 20-06-2005 / 13:2... 16-10-2006 / 14:5... 11-07-2006 / 12:3...
27	gertrud	333	5000	b	complete		
28	hss rekords to suppress	479	5000	b	complete	hs	19-10-2006 / 11:3...
29	ajl e-reserves 2001/2 with pdf	1321	5000	b	complete	ajl	30-09-2006 / 15:2...
30	MAM bind en eis sks 13-02-2006	30	5000	c	complete		
31	NSE bind en eis sks 13-02-2006	643	5000	c	complete		
32	LAN bind en eis sks 13-02-2006	119	5000	c	complete		
33	TES bind en eis sks 13-02-2006	556	5000	c	complete		
34	LAW bind en eis sks 13-02-2006	428	5000	c	complete		
35	ECO bind en eis sks 13-02-2006	241	5000	c	complete		



Create a list

The screenshot shows the 'Boolean Search' window with the following elements:

- Review File Name:** ajl patron blacklist (Annotated with '4. Name your list')
- Store Record Type:** PATRON p (Annotated with '5. Select patron file')
- Start:** p10000008
- Value B:** p11381425
- Range dropdown menu:** Range, Review, Index, Advanced (Annotated with '6. Select range')
- Record Type List:** ORDER o, CHECKIN c, CHECKIN AND CARD cc, AUTHORITY a, ITEM i, PATRON p, COURSE r, VENDOR v, INVOICE n

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

Range: specify range of database records

Review: records in previously created review file

Index: extract records from indexed field



Create a lists

Select (1)

Term	Operator	Type	Field	Condition	Value A	Value B
1		PATRON	MONEY OWED	greater than or equal to	R20.00	
2	AND					

Select (2)

Data Fields			
Fixed Fields			
43	EXP DATE	44	AC/DIV
45	PCODE2	46	USE
47	P TYPE	48	TOT CHKOUT
49	TOT RENWAL	50	CUR CH
53	HOME LIBR	54	PMESSAGE
56	MBLOCK	95	CL R
96	MONEY OWED	101	BLK UNTIL
102	CUR ITEMA	103	CUR I
104	PIUSE	105	OD PENALTY
122	ILL REQUES	163	CIRCA
268	Notice Preference	81	RECORD #
83	CREATED	84	UPDA
85	REVISIONS		
Variable Fields			
5	BOOKING	m	MESSAGE
n	PATRN NAME	a	POSTAL ADR
h		t	

Select (3)

>	greater than	=	equal to
<	less than	≠	not equal to
>=	greater than or equal to	<=	less than or equal to
N	not within	W	between
H	has	A	All Fields don't have
O	At Least one Field doesn't have	R	matches
A	starts with	\$	ends with

Select (4)

Name:

Store Record Type:

Save Save As Close



Create a list

Boolean Search

Review File Name:

Store Record Type:

Range

Term	Operator	Type	Field	Condition	Value A	Value B
1		PATRON	MONEY OWED	greater than or equal to	R20.00	
2	AND	ITEM	DUE DATE	less than or equal to	31-10-2006	- -

Select

Popup screen

Data Fields

Fixed Fields

58	COPY #	59	ICODE1	60	ICODE2	61	I TYPE	62	PRICE
63	OUT DATE	65	DUE DATE	66	PATRON#	67	LPATRON	68	LCHKIN
71	# RENEWALS	72	# OVERDUE	73	ODUE DATE	74	LEV3 USE	75	RECAL DATE
76	TOT CHKOUT	77	TOT RENEW	79	LOCATION	87	LOANRULE	88	STATUS
93	BOOK USE	94	JOUR USE	97	IMESSAGE	108	OPACMSG	109	YTDCIRC
110	LYCIRC								

Variable Fields

c	CALL NO	v	VOLUME	5	BOOKING	b	BARCODE
s	LABEL LOC	a	SYS STAT	0	INV INFO	m	MESSAGE
n		y		x		r	

OK Cancel

AND ITEM DUE DATE less than or equ

Group

Append Line

Delete

Clear All

Search Click search Retrieve Saved Query Save Save As Close

To input 2nd query line



Create a list

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File Edit View Go Tools Admin Reports Help

Create Lists Functions

Append Dedupe

Review Files Saved Searches

All Search Records Sort Records List Records Export Records

Show Records Show Info

Review file completed
Select sort

File	Name	Current Reco...	Max Records	Type	Status	Initials	Created [date/tim...
17	swerslaw	119	10000	o	complete		
18	ajl csir overdue - AIC books	30	10000	p	complete	ajl	29-09-2006 / 15:4...
19	ajl 526	281	10000	b	complete	ajl	24-10-2006 / 13:2...
20	ajl patron blacklist	668	10000	p	complete	ajl	30-10-2006 / 14:1...
21	Empty	0	10000		empty		
22	henta boeke	52	5000	o	complete	rm	26-09-2006 / 14:4...
23	VET Bind en eis hss	311	5000	b	complete	hs	20-06-2005 / 13:2...
24	ajl coldev 581	1341	5000	b	complete	ajl	16-10-2006 / 14:5...
25	hss pryse	2691	5000	o	complete	hs	11-07-2006 / 12:3...
26	status d	60	5000	o	complete		
27	gertrud	333	5000	b	complete		
28	hss rekords to suppress	479	5000	b	complete	hs	19-10-2006 / 11:3...
29	ajl e-reserves 2001/2 with pdf	1321	5000	b	complete	ajl	30-09-2006 / 15:2...
30	MAM bind en eis sks 13-02-2006	30	5000	c	complete		
31	NSE bind en eis sks 13-02-2006	643	5000	c	complete		
32	LAN bind en eis sks 13-02-2006	119	5000	c	complete		
33	TES bind en eis sks 13-02-2006	556	5000	c	complete		
34	LAW bind en eis sks 13-02-2006	428	5000	c	complete		
35	ECO bind en eis sks 13-02-2006	241	5000	c	complete		
36	HUM bind en eis sks 13-02-2006	556	5000	c	complete		
37	Ujala entrepreneurship 2000+	123	5000	b	complete		17-03-2006 / 14:4...
38	Unnamed	20	5000	o	complete	cb	06-10-2006 / 12:1...

6



Create lists: sort

SORT

The screenshot shows a dialog box titled "ajl patron blacklist" with a "Sorting Fields" section. It contains a table with columns "Line", "Type", and "Field".

Line	Type	Field
1	b	PATRN NAME

Annotations in the image include:

- A red arrow pointing to the "Type" field containing "b".
- A red box containing the text: "Double click in white space", "Make selection from options", and "Use append for 2nd level sorting".
- A black arrow pointing from the red box to the "Append" button.
- The "Sort/Save" button at the bottom is circled in red.



Create lists: view & edit

Review Files | Saved Searches

All ▾ Search Records Sort Records List Records Export Records

Show Records Show Info

Boolean Review File:ajl patron blacklist

File Tools

Boolean Review File:ajl patron blacklist

Add Edit Remove Dedupe Close

	Record	Description
<input checked="" type="checkbox"/>	1	p10701618 ADAMS, C A MISS
<input type="checkbox"/>	2	p10705715 ADAMS, I MFV
<input type="checkbox"/>	3	p10452175 ADEI
<input type="checkbox"/>	4	p10529287 ADES
<input type="checkbox"/>	5	p10529159 AHM
<input type="checkbox"/>	6	p10523704 AKIN
<input type="checkbox"/>	7	p10463689 AKR
<input type="checkbox"/>	8	p10590158 ALAI
<input type="checkbox"/>	9	p10686617 ALUE
<input type="checkbox"/>	10	p10896016 APHI
<input type="checkbox"/>	11	p10485387 AVEI
<input type="checkbox"/>	12	p10412165 BAGI
<input type="checkbox"/>	13	p10546042 BALA
<input type="checkbox"/>	14	p10431858 BALC
<input type="checkbox"/>	15	p10921710 BALC
<input type="checkbox"/>	16	p10046598 BASI
<input type="checkbox"/>	17	p10512664 BASI
<input type="checkbox"/>	18	p10341250 BAUI

Patron Record · p10701618

File Edit View Go Tools Help

Insert Paste Delete View Edit Summary Print Close

p10701618 Last Updated: 31-07-2006 Created: 08-08-2002 Revisions: 36

EXP DATE	03-03-2003	CUR CHKOUT	2	CURITEMA	2
FAC.DIV	h UP-HUM SCI	HOME LIBR	aic Academic Info Centre	CURITEMB	0
PCODE2	-	PMESSAGE	- NO MESSAGE	PIUSE	0
USERS	150 Blacklisted	MBLOCK	-	OD PENALTY	0
P TYPE	26 NO SERVICES	CL RTRND	0	ILL REQUES	0
TOT CHKOUT	4	MONEY OWED	R1,636.25	CIRCACTIVE	- -
TOT RENEWAL	0	BLK UNTIL	- -	Notice Preference	- NONE

MESSAGE
MESSAGE

blacklist rectify PTYPE & USER

MESSAGE
PATRN NAME
POSTAL ADR

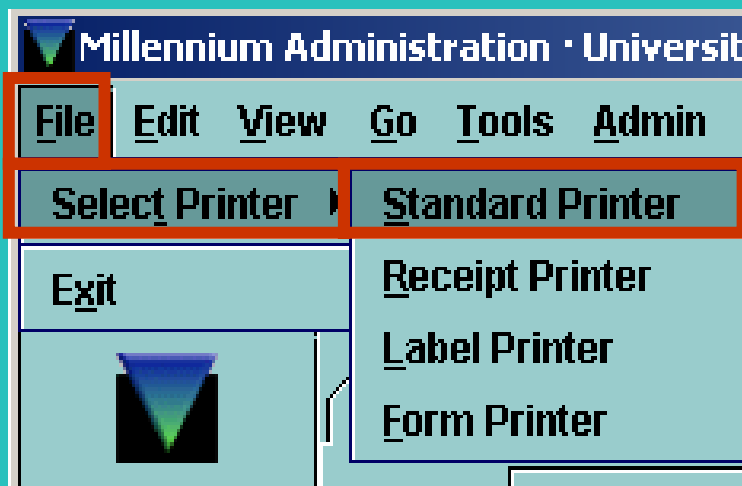
ADDRESS2

CELL PHONE 0823324658 SELF discontinued
TELEPHONE2 072 189 2801 FRIEND - unknown

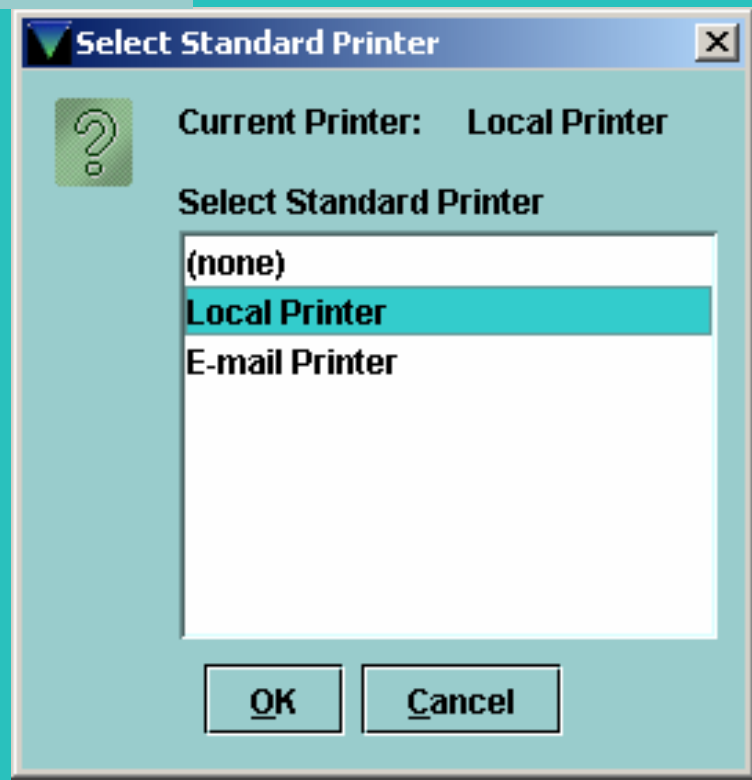
TIP: Use Control [] to scroll to next (previous screen)



Print or e-mail data from review file



Printer settings





Print or e-mail data from review file

Create Lists Functions

Append Dedupe Copy Empty Rename Resume Stop Suspend Settings

Review Files Saved Searches

All Search Records Sort Records **List Records** Export Records

Click list records 1

Millennium

Create Lists

List Format

List PATRON Information

Fields to be listed

Line	Type	Field
1	b	PATRN NAME
2	PATRON	HOME LIBR
3	PATRON	EXP DATE

Append

Insert

Delete

Choose record type And field/s for output 2

Append – add a type & field
Insert – insert a type & field
Delete – delete a type & field

Page heading

Starting record (1-67) 1

Ending record (1-67) 67

Number of blank lines between records 0

Number the records in the list

Display meanings of fixed-length fields instead of codes

Display each variable-length field on a new line

Display labels for variable-length fields

If listing bibliographic title, print it in uppercase

OK Cancel

Choose options to format the list 3

Click OK

Records	Type	Status	Initials	Created [date/tim...
0	b	complete		
0	o	complete		



Examples of create lists

**Search for new titles 01/01/2006-31/03/06 with location mus*
Exclude items on the fly (temp records)**

Term	Operator		Type	Field	Condition	Value A	Value B
1			ITEM	CREATED	between	01-01-2006	31-03-2006
2	AND		ITEM	IMESSAGE	not equal to	f	
3	AND		ITEM	LOCATION	starts with	mus	

--oOo---

Search for patrons owing R20.00 and more, or with items due 31/10/2006 and earlier.

List should only include patron types 4 and 5 and patron types greater than 10

Term	Operator		Type	Field	Condition	Value A	Value B
1			PATRON	MONEY OW...	greater tha...	R20.00	
2	OR		ITEM	DUE DATE	less than or...	31-10-2006	- -
3	AND	(PATRON	P TYPE	between	4	5
4	OR		PATRON	P TYPE	greater tha...	10)



Example of create list: MARC Tag search

If you choose ! MARC Tag, the system provides a prompt indicating what to enter.



You can omit the subfields or indicators. For example, enter "856" to instruct the system to look in MARC tag 856, including any indicators and all subfields.

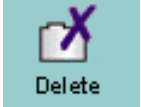

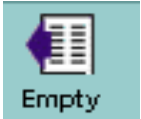
Range b10000008 b16943648

Term	Operator	Type	Field	Condition	Value A	Value B
1		BIBLIOGRA...	MARC Tag 856	has	http	

```
856 4 1 |uhttp://0-atoz.ebsco.com.innopac.up.ac.za/home.asp?id=805&sid=111321684&cmbScope=BA/z
<br><IMG SRC="/screens/webver.gif" height=22 width=160 border=0 alt="Electronic version">
```



Summary

- Know Boolean operators & search criteria
- Start with simple searches
- Test your results (use sort & view to check)
-  delete from database (in edit mode)
-  remove from review file only
-  empty file when done
- Quality of data retrieved depends on quality of data in system



References

Create lists - Manual #100665

Using Boolean Searching & specifying search criteria

Manual #101608; #100672; #100673

FAQ: Common create lists problems & solutions

<http://csdirect.iii.com/faq/>

Training manual

<http://csdirect.iii.com/documentation/training/>



Still using the text based method?

- Try Millennium create lists
 - It's user friendly and much easier!

