



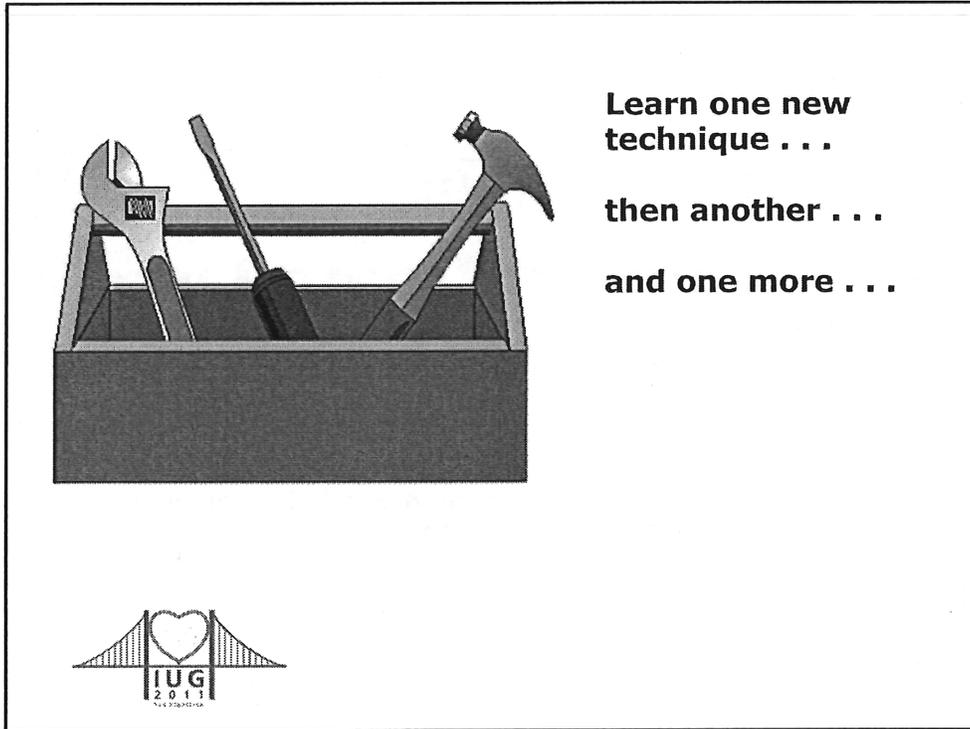
Become a Create Lists Power User

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Introduction

Three topics

- Create Lists built-in tools
- Using Excel with Create Lists
- Creating a review file with a set of barcodes (if time)



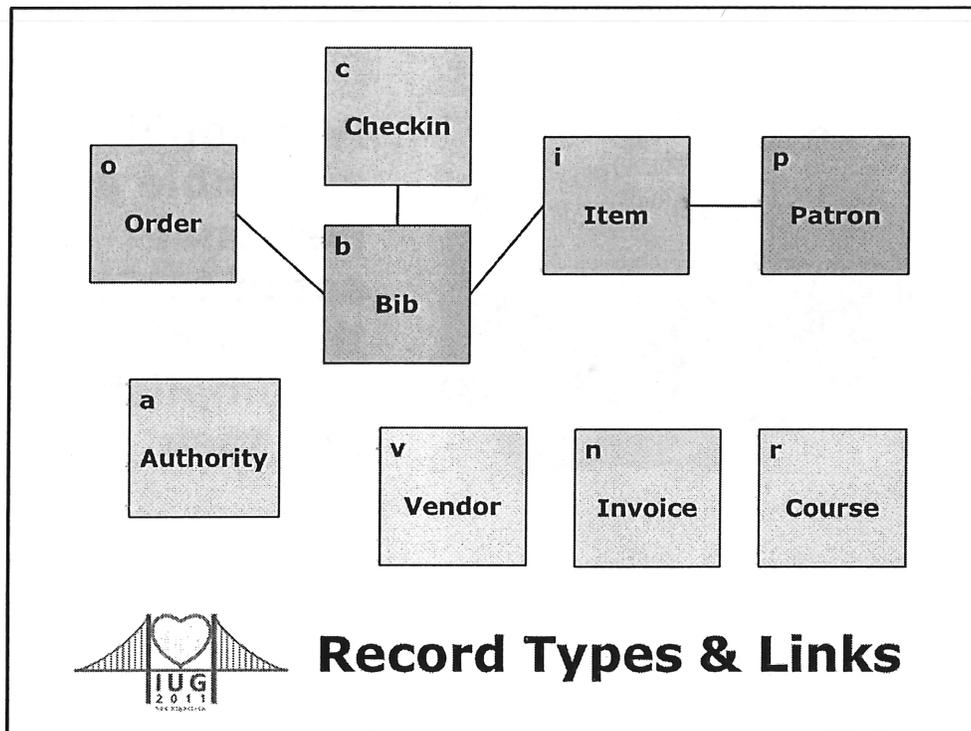
Rather than trying to learn everything about Create Lists – learn one tool or technique at a time – and learn that tool really well



**And you'll
assemble a
personal
set of tools
that can
accomplish
any task**



If you learn a small set of tools really, really well – you'll often be able to use tools in your tool bag in innovative ways to solve your current challenge



- Can only use data from a record that is one link away from the record type you selected to save
- Unavailable for except when searching for the selected record type:
 - Record number
 - Created date
 - Updated date

Create Lists Functions

Append Delete Copy Empty Rename Open Move Save Print

Review Files Saved Searches Saved Sorts Saved Lists Saved Exports

All Search Records Sort Records List Records Export Records

Show Records Show Info

File #	Name	Current	Max R.	Type	Status	Initials	Created (date:time)
1	OPAC 03-17-11 1524AM new Ho...	13	500	b	complete		
2	MARCIVE I.TYPE MATERIAL TYPE...	92	500	b	complete	sm	03-14-2011 / 08:15:05
3	STC Checked Out 11-19-10	5	500	i	complete	ms	11-19-2010 / 13:11:47
4	Empty	0	500		empty		
5	FF adds July-Dec 2010	53	500	b	complete	ma	01-19-2011 / 11:19:55
6	Empty	0	500		empty		
7	Cornes with	103	500	a	complete		03-04-2011 / 10:57:51
8	Empty	0	500		empty		
9	Unread	25	500	b	complete	ra	11-03-2010 / 12:22:21
10	STC Full inventory	50	500	i	complete	ms	01-31-2011 / 15:21:43
11	Feature event books to change lo...	1	500	i	complete	ms	03-18-2011 / 11:37:46
12	Leans & Collections 2/23/11	39	500	p	complete	kc	02-23-2011 / 11:14:18
13	Empty	0	500		empty		
14	No-Overseas/Display	40	500	i	complete	ma	11-30-2010 / 10:21:05
15	Empty	0	500		empty		
16	Summit AAR	24	500	i	complete	kc	05-20-2010 / 10:35:18
17	OVERSIZE BOOK MEASUREMENTS	30	500	i	complete		
18	Empty	0	500		empty		
19	letp	2	500	a	complete	mm	03-15-2011 / 13:44:35
20	Empty	0	500		empty		
21	staylight lounge feb	246	500	i	complete	dw	02-25-2011 / 16:17:29
22	Judith pine videos	19	500	i	complete	th	02-09-2011 / 11:47:41

Create Lists Built-in Tools



Absence of a Field

▼ Boolean Search

Review File Name:

Store Record Type:

Range ▼ Start Stop

Term	Operator	Type	Field	Condition	Value A	Value B
1		BIBLIOGRAPHIC	MARC Tag 245	equal to		



=

Presence of a Field

▼ Boolean Search

Review File Name:

Store Record Type:

Range ▼ Start Stop

Term	Operator	Type	Field	Condition	Value A	Value B
1		BIBLIOGRAPHIC	MARC Tag 086	not equal to		



!=

Presence of a Field missing a Subfield

Boolean Search

Review File Name:

Store Record Type:

Range

Term	Operator	Type	Field	Condition	Value A	Val
1		BIBLIOGRAPHIC	MARC Tag 856	not equal to		
2	AND	BIBLIOGRAPHIC	MARC Tag 856 u	equal to		



Not 856??|u

You don't need to put in wild cards for the indicators between the tag and the subfield code(s)

Find Records with No Items

Boolean Search

Review File Name:

Store Record Type:

Range

Term	Operator	Type	Field	Condition	Value A	Val
1		ITEM	ITYPE	equal to	0	
2	AND	BIBLIOGRA...	LINKED REC	not exist to	ITEM	



^ n

- First, restrict the bibs to those you're interested in, e.g., those with a certain ITYPE, or in a location, or within a call number range, etc.
- Then, specify that the b BIBLIOGRAPHIC records' ^ LINKED RECORDS n does not include any i ITEM record

Record #'s in Saved Searches

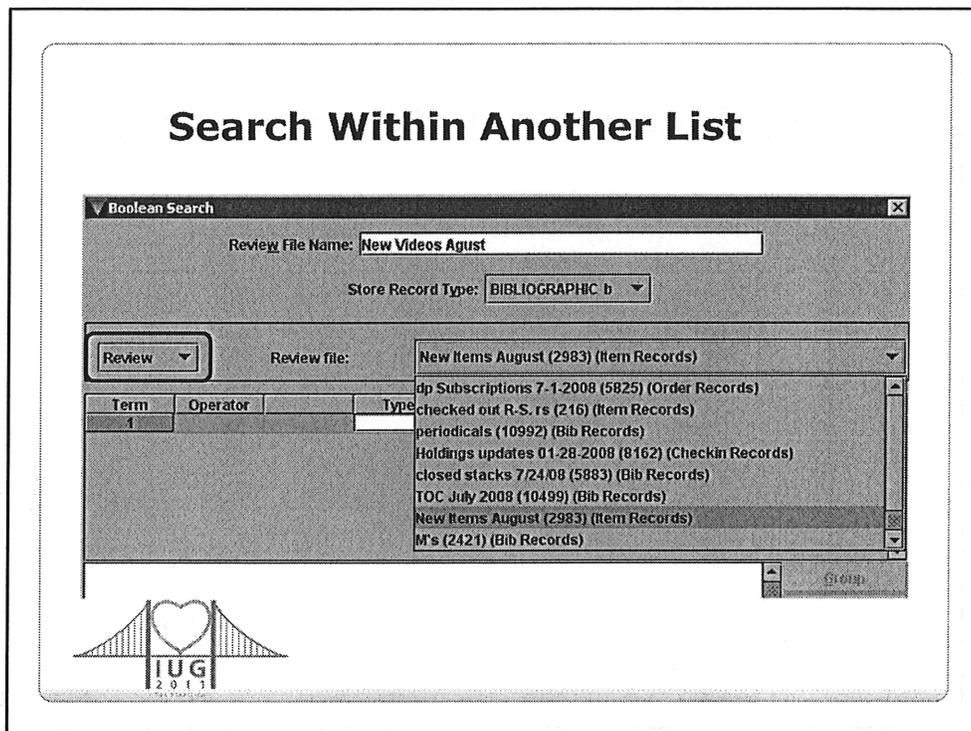
- Option 1 – Uncheck 'Include Record Information'
- Option 2 – Use record type letter + asterisk

Term	Operator	Type	Field	Condition	Value A		
1		AUTHORITY	MARC Tag 699	All Fields don't have	MARS		
2	AND	AUTHORITY	MARC Tag 699	All Fields don't have	NACO override		
3	AND	AUTHORITY	MARC Tag 699	All Fields don't have	Local authority		
4	AND	AUTHORITY	MARC Tag 610	not equal to			



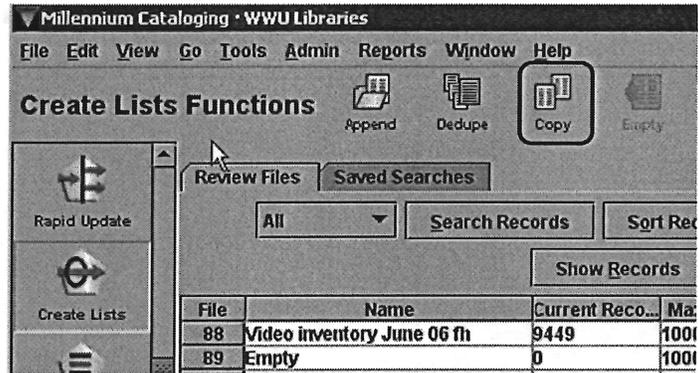
- Option #1 – uncheck the 'Include Record Information' option and the saved query will obtain new record numbers each time you use it
- Option #2 – use a record type letter followed by an asterisk and the search will use the maximum record number when you run the saved search

Search Within Another List



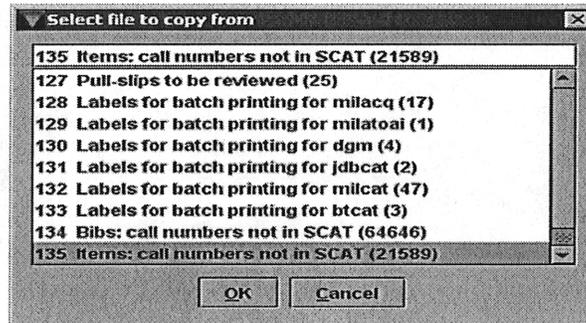
- When you need to create multiple lists where the records in all the lists have one or more characteristics in common, it is quicker to first create a list with all the records of interest, then create individual files that are subsets of the first file.
- For example, I needed to get lists of the new books, CDs, and videos for August.
- First, I created a file of all Item records created in August that had Status 'available'.
- Then, I created a new file using the Review source option, and selected all the items in my first list that had an ITEM TYPE for videos.
- This was quicker than running three review files, each examining every record in our database.

System-generated Review Files



- Select an empty review file and click on the Copy icon

System-generated Review Files



- On our system, we have 109 review files defined.
- All files with a number greater than 109 are sets of records (actually pointers to records) that were generated by the system
- This example shows a set of 21,589 item records with call numbers that were not found in the SCAT table the last time our Bibliographic report ran in the Statistic module.
- Some examples of other types of system-generated files commonly found in this list are:
 - URL Verification Errors
 - Items on Holdshelf
 - Various record loads
 - Records that were busy during a global update

Reference: see manual page #106366

Limit by Call Number – The Wrong Way

Boolean Search

Review File Name:

Store Record Type:

Range

Term	Operator	Type	Field	Condition	Value A	Value B
1		BIBLIOGRAPHIC	CALL #	between	B	BZ



- This search uses the call number fields in the bib and item records which are not normalized – so some searches will not obtain the desired results
- This type of search has to examine every record in the entire database

Limit by Call Number – The Right Way

The screenshot shows a 'Boolean Search' window. At the top, 'Review File Name' is 'Call # LCB-BZ'. Below it, 'Store Record Type' is 'BIBLIOGRAPHIC b'. A search criteria bar shows 'Index' selected, 'LC CALL NO (c)' as the field, and 'B' to 'BZ' as the range. Below this is a table with columns: Term, Operator, Type, Field, Condition, Value A, Value B. The table contains one row with '1' in the Term column. A 'Search' dialog box is open, displaying a question mark icon and the text: 'No search criteria have been specified. Retrieve all records in range?' with 'Yes' and 'No' buttons.

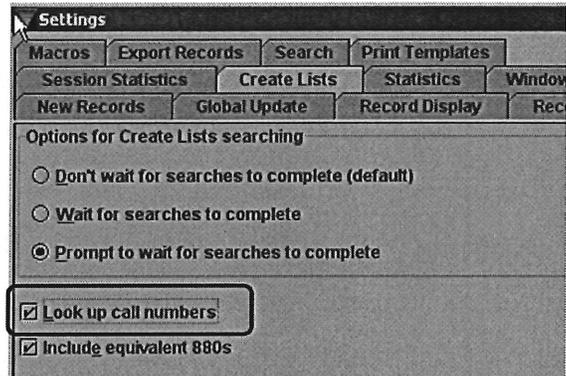
Term	Operator	Type	Field	Condition	Value A	Value B
1						

- You can set the same criteria by using the Call# index for your searching instead of the entire bibliographic range
- Notice that the search criteria from the previous example is now specified in the Index / Range for searching, and the search criteria is empty
- This has the same effect as the search above in that it will find only items within this call number range, but it limits before searching.
- You can specify additional search criteria within the call number range specified above, or simply select all titles within the range

NOTE: Call numbers must be normalized (*see manual page #106204*):

- Use 7 places without the cutter for LC numbers: pn⁶¹
- Cutter numbers go after the first seven spaces, and are separated by a space. In other words, cutters should begin with the ninth space: GB⁷⁰¹W
- Use 7 places including the . in Gov Docs: D⁵

Items Records + Call Number



- In Millennium's Admin -> Settings

Item Records + Call Number

Boolean Search

Review File Name:

Store Record Type:

Range

Term	Operator	Type	Field	Condition	Value A	Val
1		ITEM	TYPE	equal to	5	

Score Items with Call #'s

Export ITEM Information

Fields to be exported

Line	Type	Field	
1	ITEM	RECORD #	Append Insert Delete
2	ITEM	CALL #	
3	ITEM	VOLUME	
4	BIBLIOGRAPHIC	MARC Tag 245lanpb	
5			



- If you search for call numbers in item records, this tells the system that if the item (or checkin) record doesn't contain a call number field, look 'up' for the call number in the bib record
- With this box checked all subsequent actions taken on the review, like a sort, also use the call number from the bib record for item records lacking a call number
- Ref: manual page #100673 & 105323

Using Regular Expressions

The screenshot shows a search interface with a 'Range' dropdown, 'Start' field containing 'b1000008', and 'Stop' field containing 'b21659084'. Below this is a table with columns: Term, Operator, Type, Field, Condition, Value A, and Value B. The first row shows 'BIBLOGRA.. TITLE' in the Field column. A 'Select' dialog box is open, displaying a list of conditions. The 'R matches' option is selected and highlighted with a red border. Other options include 'greater than', 'equal to', 'less than', 'not equal to', 'greater than or equal to', 'less than or equal to', 'not within', 'between', 'has', 'All Fields don't have', 'At Least one Field doesn't have', 'starts with', and 'ends with'. 'OK' and 'Cancel' buttons are at the bottom of the dialog.

Term	Operator	Type	Field	Condition	Value A	Value B
			BIBLOGRA.. TITLE			

Select

>	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
^	starts with	\$	ends with

OK Cancel



- Richard V. Jackson, Huntington Library
Hope you attended his presentation – it was at 1:30 this afternoon
Playing With “Matches” handout, IUG Conference 2011 (San Francisco)
<http://conferences.innovativeusers.org/index.php/IUG2011/IUG2011/director/downloadFile/884/582>

Finding Bad Subfield Codes

245 10 Love for love|[microform] :|ba comedy /|cby
William Congreve. ↑

Boolean Search

Review File Name: 245 Bad Subfield Codes

Store Record Type: BIBLIOGRAPHIC b

Range Start b10000008 Stop b24074834

Term	Operator	Type	Field	Condition	Value A	Val
1		BIBLIOGRAPHIC	MARC Tag 245	matches	[^abcfghknps]	



[[^abcfghknps]

- Finding subfield codes that are missing or invalid
- From: Playing With “Matches”, by Richard V. Jackson, Huntington Library, IUG Conference 2007 (San Jose)