infonet-logo-primary.png Create Lists Training

The following directions have been extracted from the Create Lists manual for the purpose of training. For a more concise and regularly updated information on Create Lists, please find the manual at <http://www.maineinfonet.org/supportportal/training/create-lists/>.

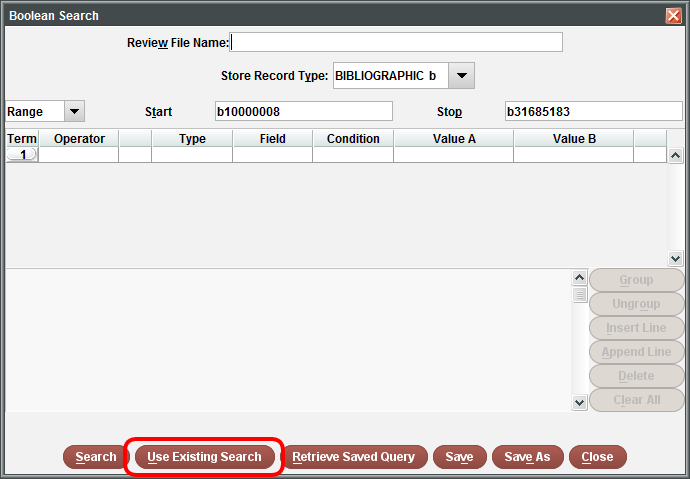
Creating a Review File Off of another Review File

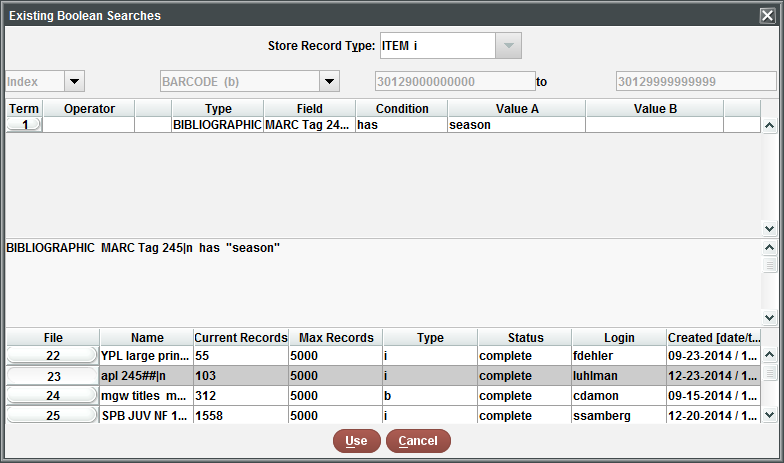
1. Select an empty review file.
2. Click the ***Search*** ***Records*** button.
3. The ***Boolean*** ***Search*** window will appear.



1. Name the ***Review File***.
2. Select the ***Store Record Type***. Remember this is dependent on the record links (refer to [Record Links](#RecordLinks)), so the file you wish to create a review on has to be either the exact record type or a linked record type.
3. Change the ***Range*** to ***Review***.
4. In the ***Review file*** drop-down menu, scroll until you find the review file you want to create a list off of.
5. Enter the search parameters.
6. When ready, click the ***Search*** button to run the list.

Use Existing Search

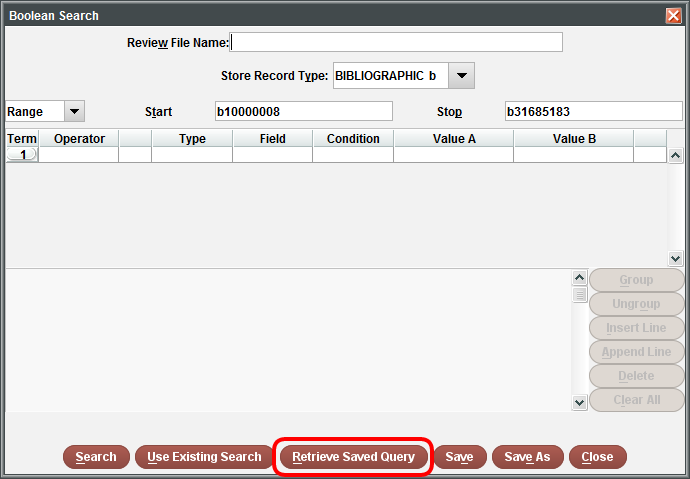
1. Select an empty review file.
2. Click the ***Search*** ***Records*** button.
3. The ***Boolean*** ***Search*** window will appear.
4. Name the Review File.
5. Click the ***Use*** ***Existing*** ***Search*** button.
6. Scroll through the search list and select the list to be used.



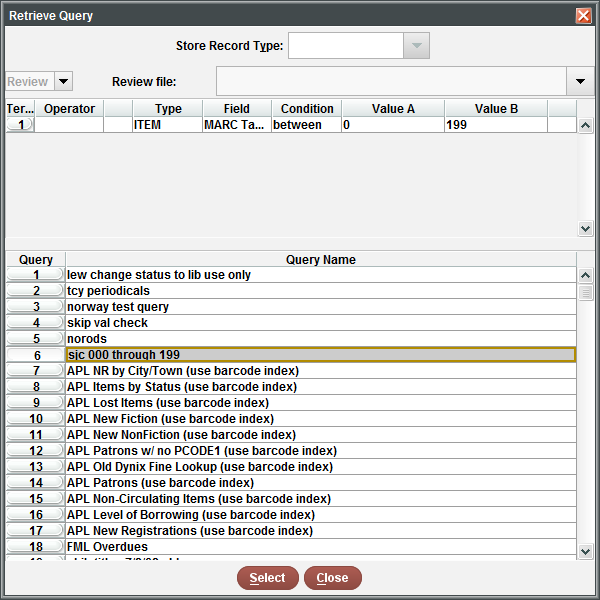
1. Click the ***Use*** button.
2. When ready, click the ***Search*** button to run the list.

Retrieve Saved Query

1. Select an empty review file.
2. Click the ***Search*** ***Records*** button.
3. The ***Boolean*** ***Search*** window will appear.
4. Name the Review File.
5. Click the ***Retrieve Saved Query*** button.



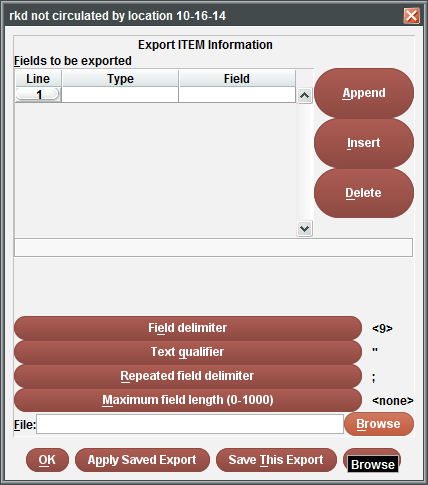
1. Scroll through the search list and select the list to be used.
2. Click the ***Select*** button.
3. When ready, click the ***Search*** button to run the list.



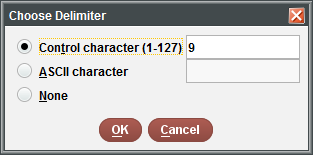
Export Records

The Export Records button allows the user to export a review files select data in .txt format. This enables the user to bring the data into another program and manipulate the data for some other purpose, i.e. a spreadsheet or report.

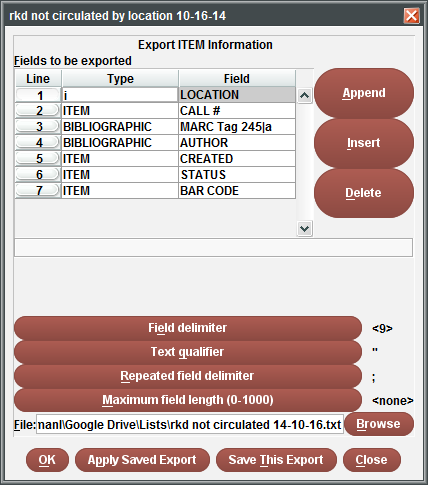
1. Select the ***Review File*** to be exported.
2. Click the ***Export Records*** button.
3. Enter the fields that you would like exported. Use ***Append*** to add lines to the end of the list and use ***Insert*** to add a line in between parameters.



1. Select the ***Field delimiter*** button.
2. Click the radio button next to ***Control character (1-127)***. Enter ***9*** in the text box.



1. Click ***OK***.
2. Select the ***Browse*** button.
3. Enter a name and ***Save*** the file in an easy to find location.
4. Once done, your ***Export*** parameters should look similar to this:

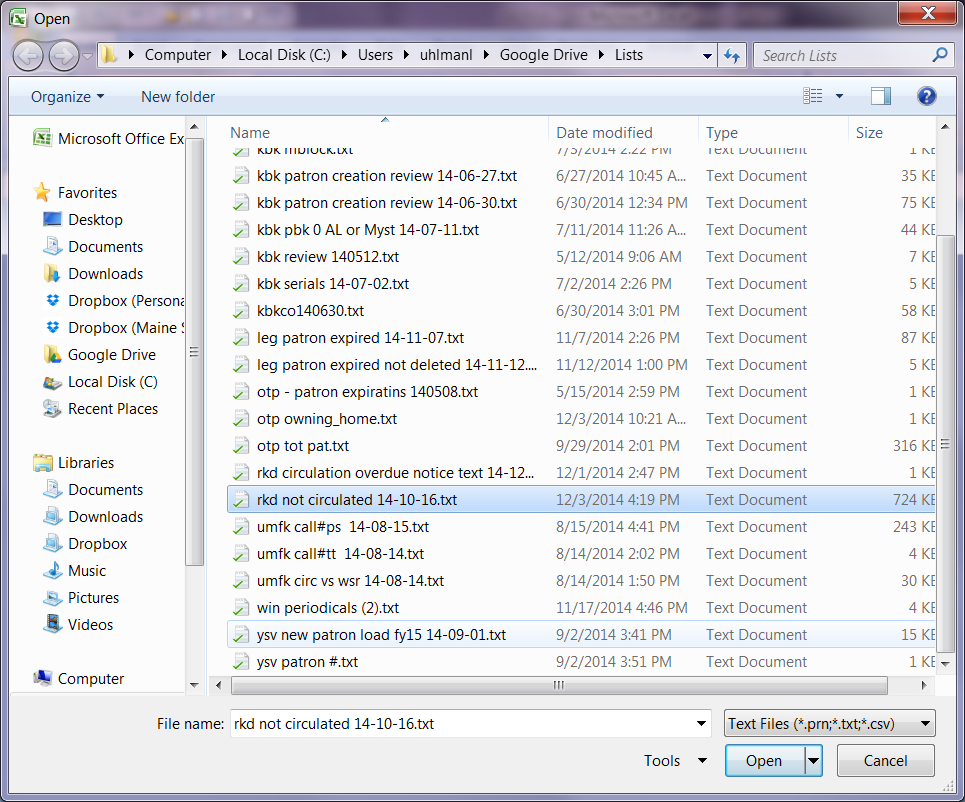


1. If everything looks good, click ***OK***.

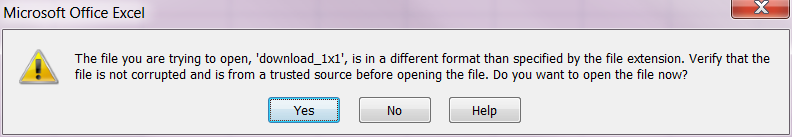
Manipulating an exported list

An exported list can be manipulated in other programs that support the exported file type. Our system uses \*.txt or a text file to export data. Depending on how the list was exported it may be comma separated or use other delimiters to separate the data. The delimiters assist the program in parsing the data into the appropriate fields to make it legible. To manipulate your list into a view-friendly list, report, etc., refer to the following:

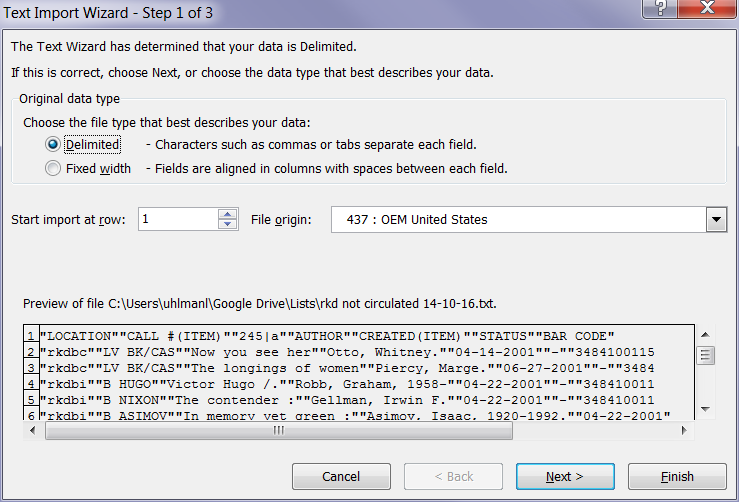
1. Open ***Excel.***
2. Select ***Open.***
3. Browse for the exported review file and open it.



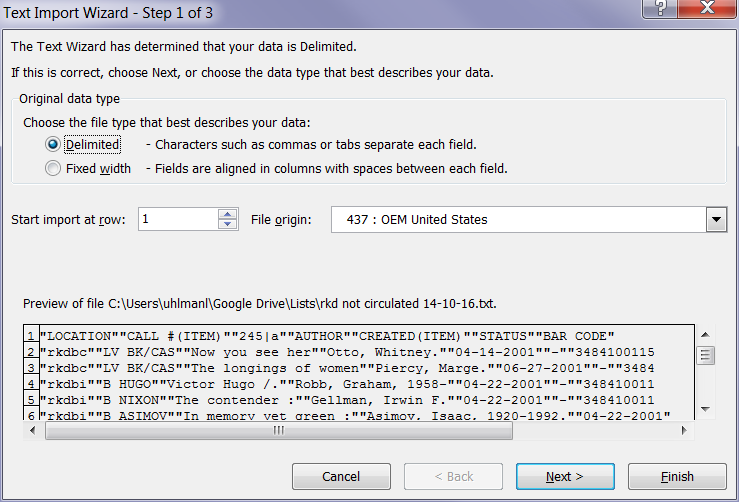
1. If you receive this message, select ***Yes***. Otherwise, move on to #5.



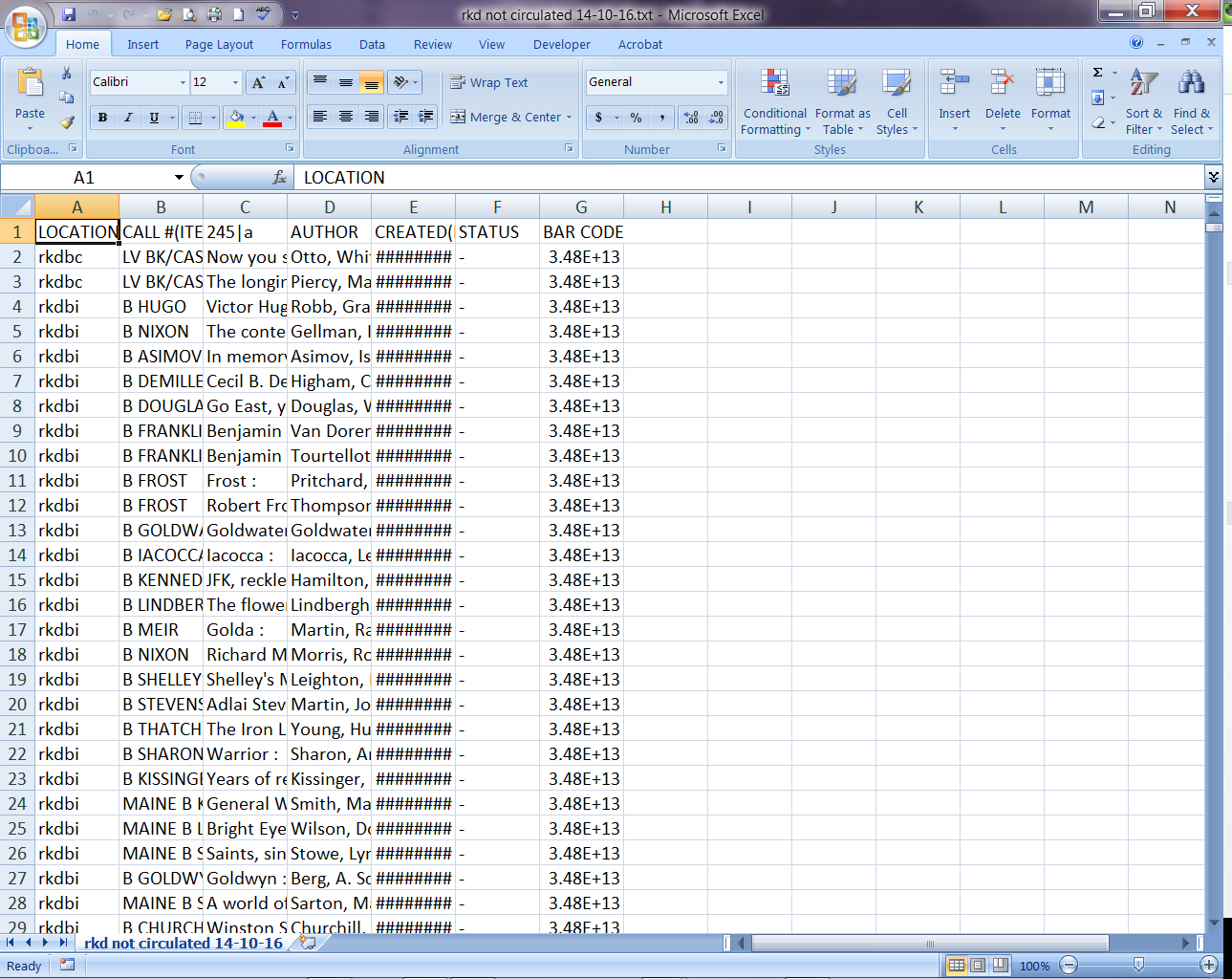
1. In the Text ***Import Wizard***, make sure the ***Delimited*** radio button is selected and click ***Next.***



1. Click the checkbox next to ***Other*** and insert the character **|**(pipe).



1. Click ***Finish.***
2. The list should now be in an easily viewed format and editable.



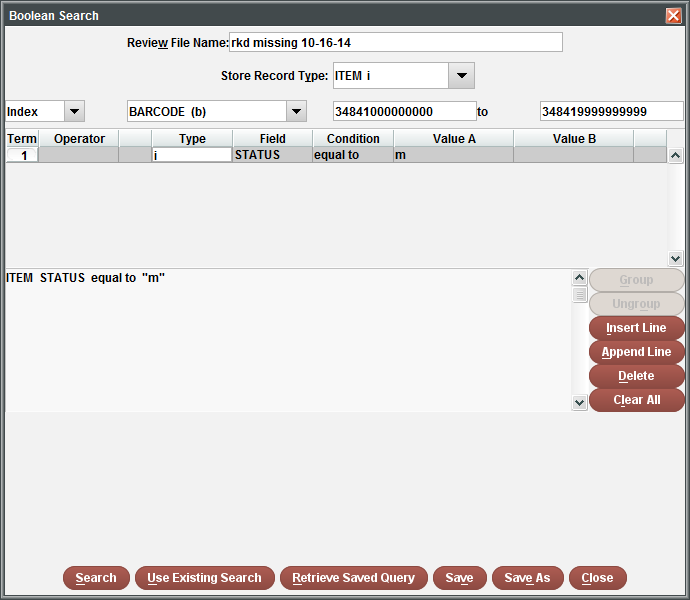
1. Adjust the cell format and width as necessary.

List Examples

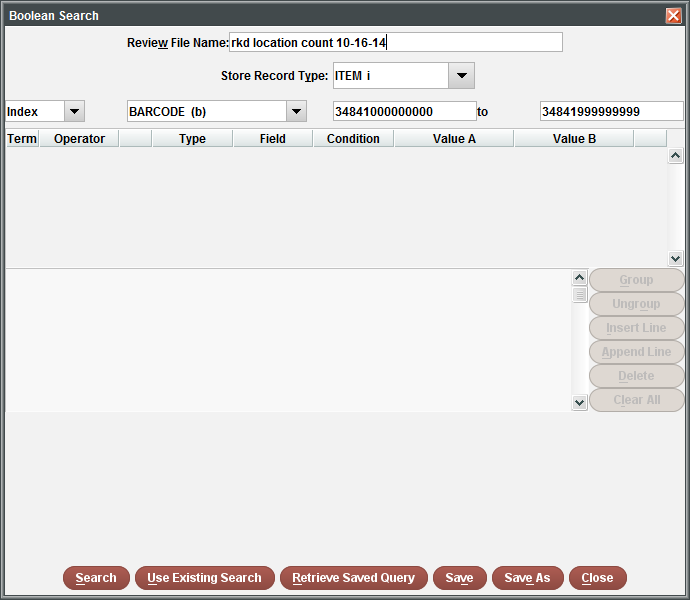
Location Count

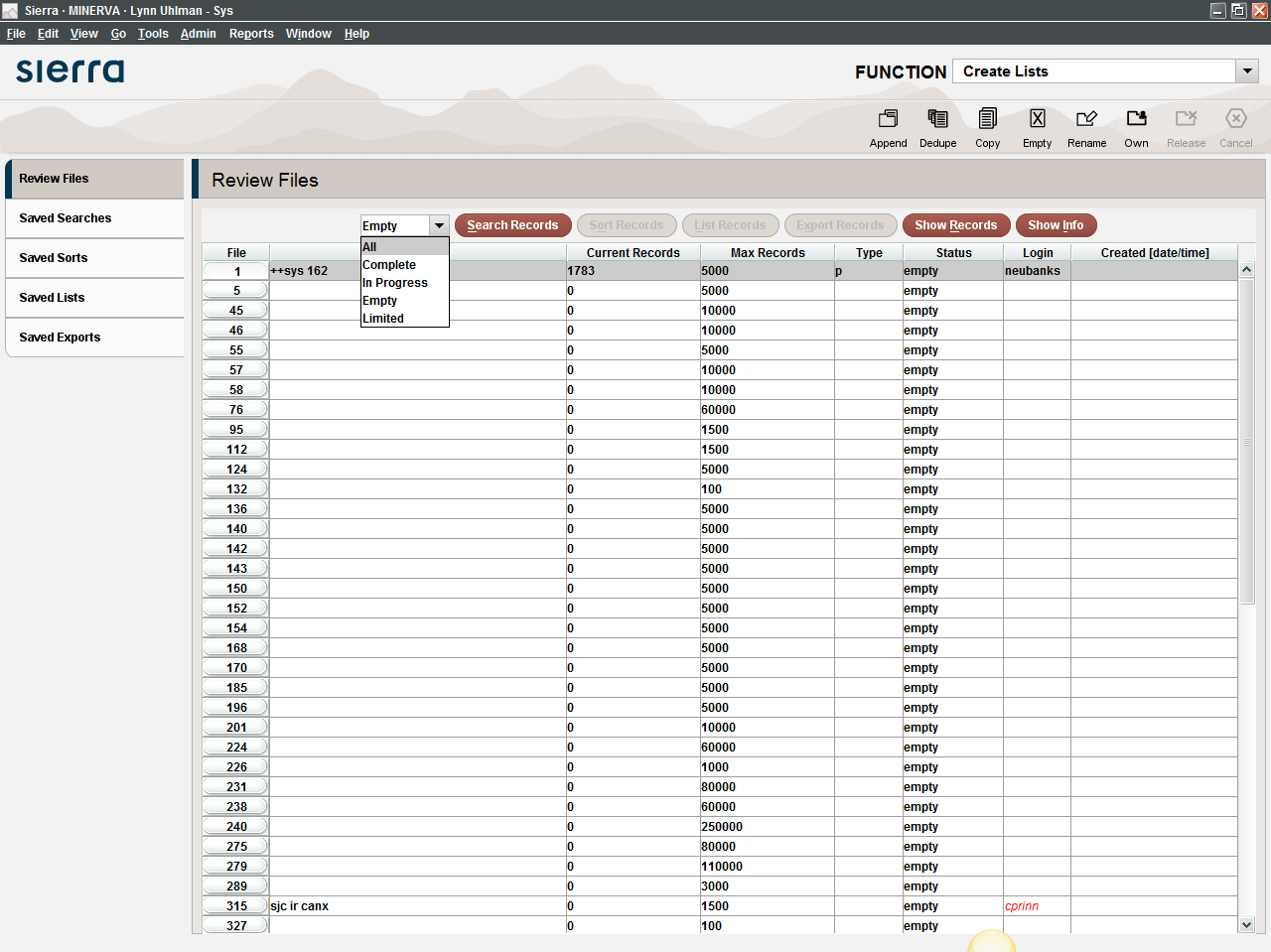
1. Go to ***Create Lists***.
2. Find an empty review file by selecting the drop down menu arrow and choose ***Empty***.
3. Double-click on an empty review file that has a ***Max Records*** capacity to suit your needs.
4. The ***Boolean Search*** screen should appear.
5. Enter in a ***Review File Name***.
6. Change the Store Record Type to ***Item i***.
7. In the drop-down menus, change the first one to ***Index*** and the second to ***Barcode.*** Next, enter your beginning barcode range ***3xxxx000000000*** and your ending barcode range ***3xxxx999999999*** in the text boxes.

**Example:**



1. Leave the parameters blank.



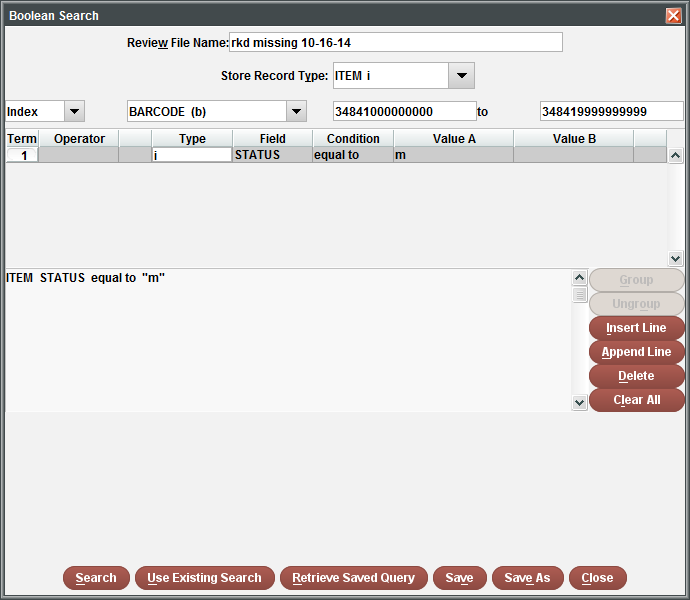
1. Once your screen looks like the above, click on the ***Search*** button.
2. Next, change the ***Review*** ***File*** view to ***All*** or ***Limited***.
3. Find your review file and check the ***Status*** column. If it is ***complete***, you can now work with the list.

C:\Users\uhlmanl\AppData\Local\Temp\ScreenClip.png

Not Circulating

1. Go to ***Create Lists***.
2. Find an empty review file by selecting the drop down menu arrow and choose ***Empty***.
3. Double-click on an empty review file that has a ***Max Records*** capacity to suit your needs.
4. The ***Boolean Search*** screen should appear.
5. Enter in a ***Review File Name***.
6. Change the Store Record Type to ***Item i***.
7. In the drop-down menus, change the first one to ***Index*** and the second to ***Barcode.*** Next, enter your beginning barcode range ***3xxxx000000000*** and your ending barcode range ***3xxxx999999999*** in the text boxes.

**Example:**



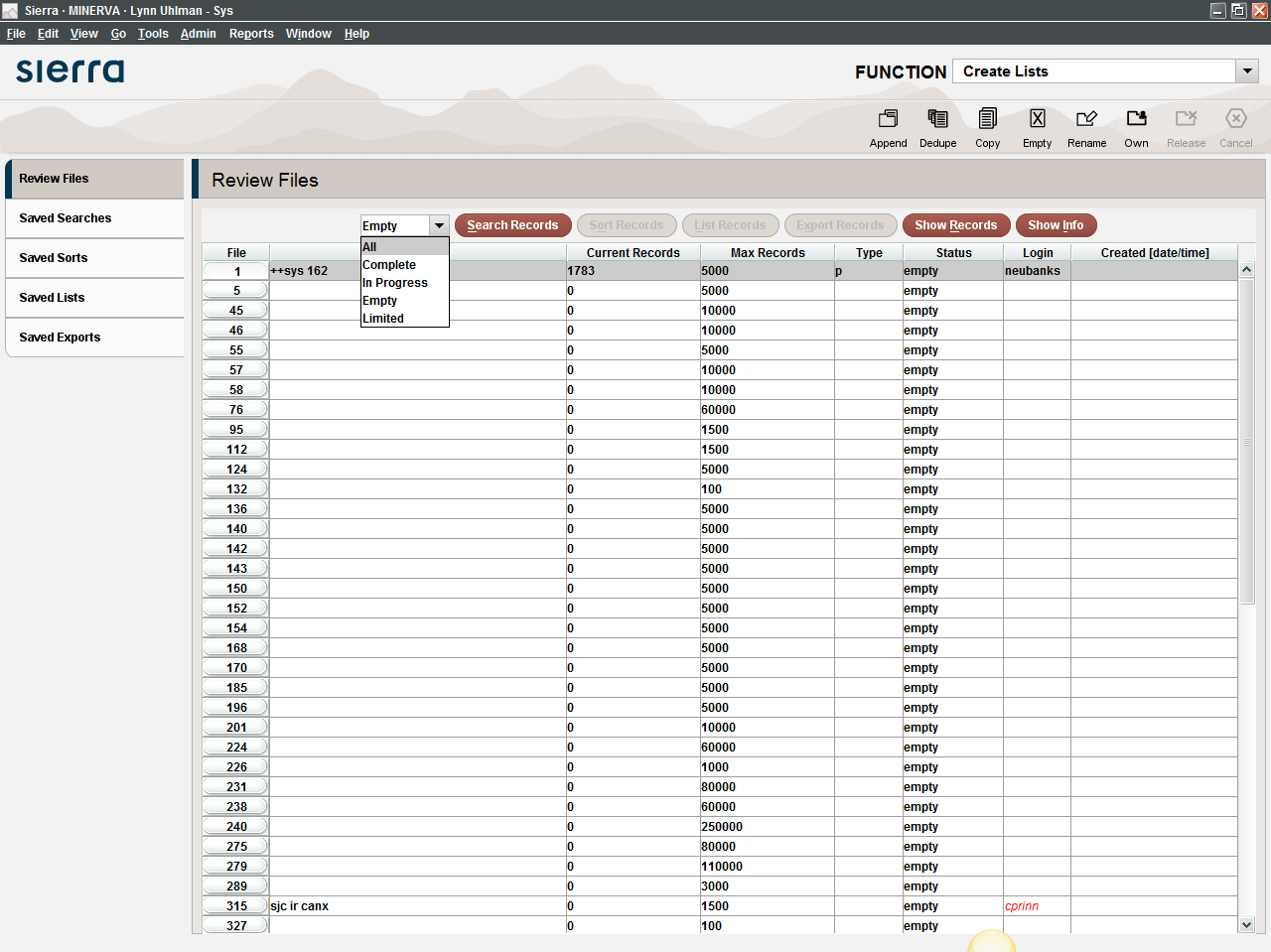
1. In line 1 of the parameters:

(Double click the parameter boxes to see the available options.)

1. *Type* to ***Item*** - ***i***
2. *Field* to ***TOT CHKOUT*** - ***76***
3. *Condition* to ***Equal to*** - ***=***
4. *Value A to* ***0***
5. Click the ***Append*** ***Line*** button.
6. In line 2 of the parameters:
7. *Type* to ***Item*** - ***i***
8. *Field* to ***CREATED*** - ***83***
9. *Condition* to ***less than or equal to*** - ***<=***
10. *Value* *A* to ***mmddyy*** (If you don’t want anything more recent than January 1, 2013 then enter 12-31-2012)



1. Once your screen looks like the above, click on the ***Search*** button.
2. Next, change the ***Review*** ***File*** view to ***All*** or ***Limited***.



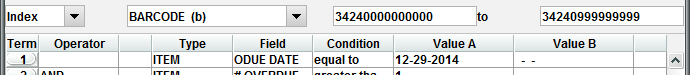
1. Find your review file and check the ***Status*** column. If it is ***complete***, you can now work with the list.

C:\Users\uhlmanl\AppData\Local\Temp\ScreenClip.png

Items on patron accounts that should have received an Overdue notice

1. Go to ***Create Lists***.
2. Find an empty review file by selecting the drop down menu arrow and choose ***Empty***.
3. Double-click on an empty review file that has a ***Max Records*** capacity to suit your needs.
4. The ***Boolean Search*** screen should appear.
5. Enter in a ***Review File Name***.
6. Change the Store Record Type to ***Item i***.
7. In the drop-down menus, change the first one to ***Index*** and the second to ***Barcode.*** Next, enter your beginning barcode range ***3xxxx000000000*** and your ending barcode range ***3xxxx999999999*** in the text boxes.

**Example:**



1. In line 1 of the parameters:

(Double click the parameter boxes to see the available options.)

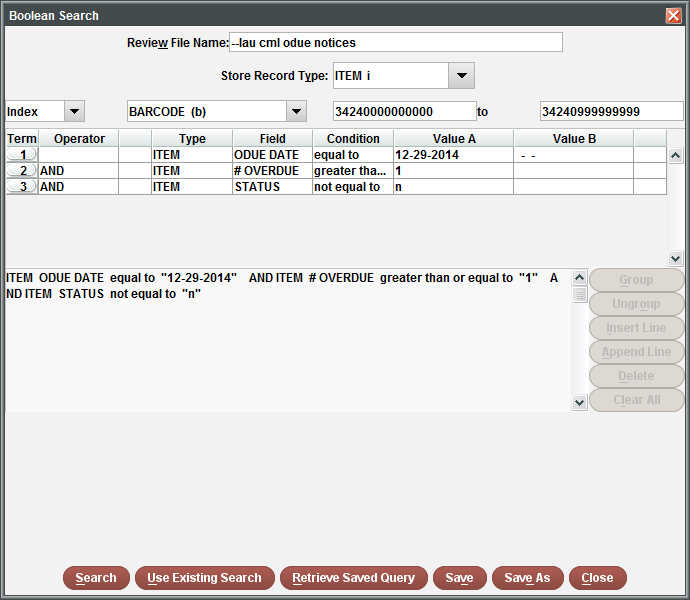
1. *Type* to ***Item*** - ***i***
2. *Field* to ***ODUE DATE*** – ***73***  or whichever PCode you use to classify your non-resident patrons.
3. *Condition* to ***equal to*** - ***=***
4. *Value A* to today’s date
5. In line 2 of the parameters:

(Double click the parameter boxes to see the available options.)

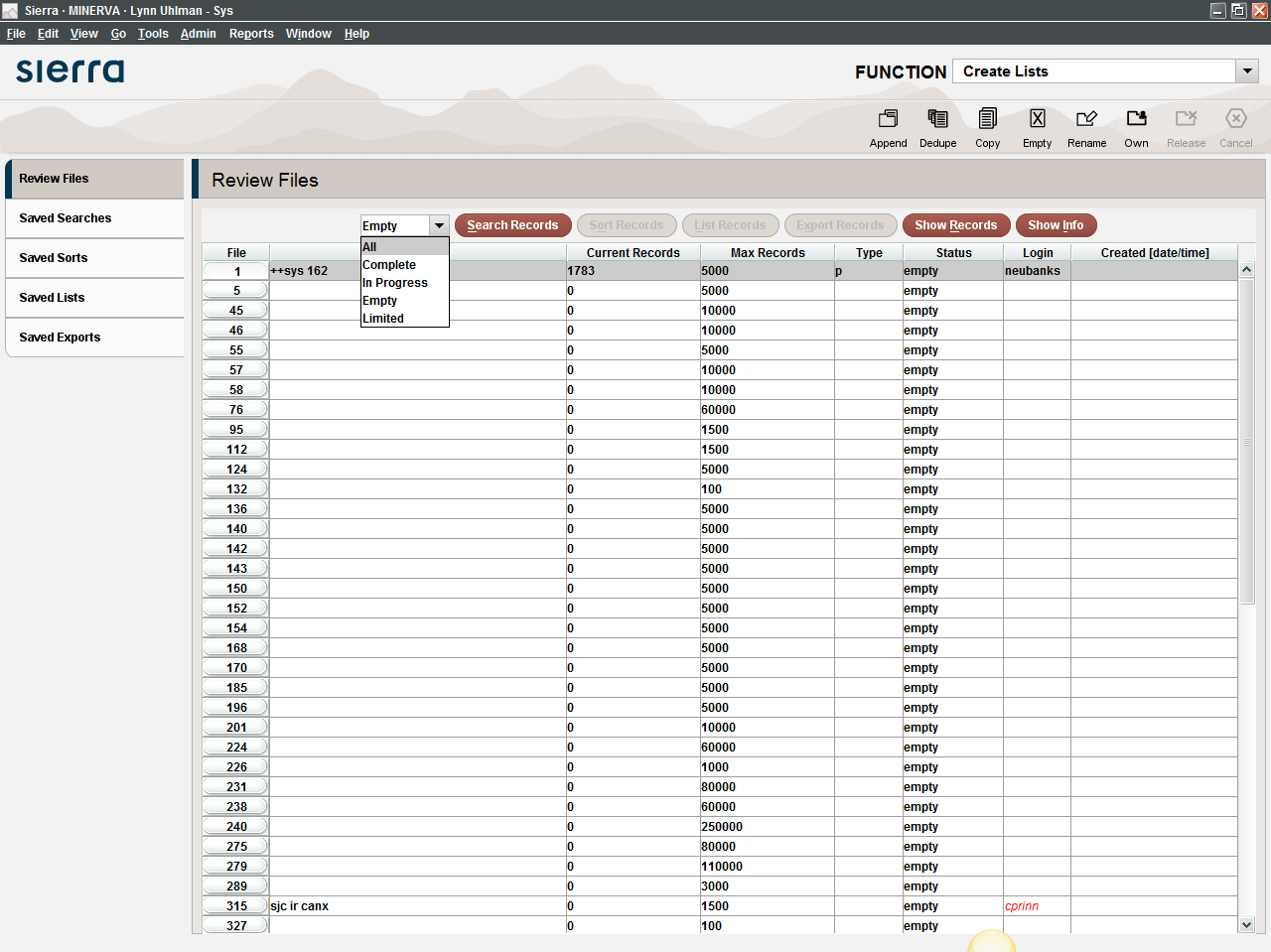
1. *Type* to ***Item*** - ***i***
2. *Field* to ***# OVERDUE*** – ***72***  or whichever PCode you use to classify your non-resident patrons.
3. *Condition* to ***greater than or equal to*** - ***>=***
4. *Value A* to ***1***
5. In line 3 of the parameters:

(Double click the parameter boxes to see the available options.)

1. *Type* to ***Item*** - ***i***
2. *Field* to ***STATUS*** – ***88***  or whichever PCode you use to classify your non-resident patrons.
3. *Condition* to ***not equal to*** - ***!=***
4. *Value A* to ***n***



1. Once your screen looks similar to the above, click on the ***Search*** button.
2. Next, change the ***Review*** ***File*** view to ***All*** or ***Limited***.

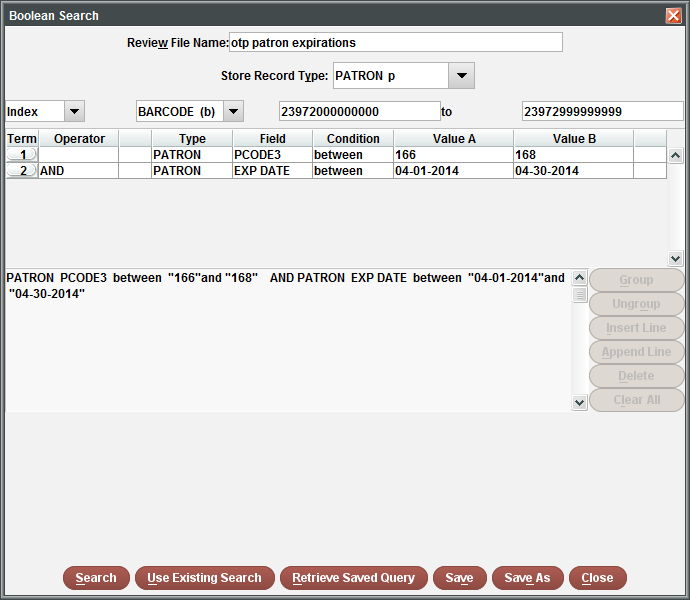


Find your review file and check the ***Status*** column. If it is ***complete***, you can now work with the list.

Patrons who should have received bills

1. Go to ***Create Lists***.
2. Find an empty review file by selecting the drop down menu arrow and choose ***Empty***.
3. Double-click on an empty review file that has a ***Max Records*** capacity to suit your needs.
4. The ***Boolean Search*** screen should appear.
5. Enter in a ***Review File Name***.
6. Change the Store Record Type to ***Patron p***.
7. In the drop-down menus, change the first one to ***Index*** and the second to ***Barcode.*** Next, enter your beginning barcode range ***2xxxx000000000*** and your ending barcode range 2***xxxx999999999*** in the text boxes.

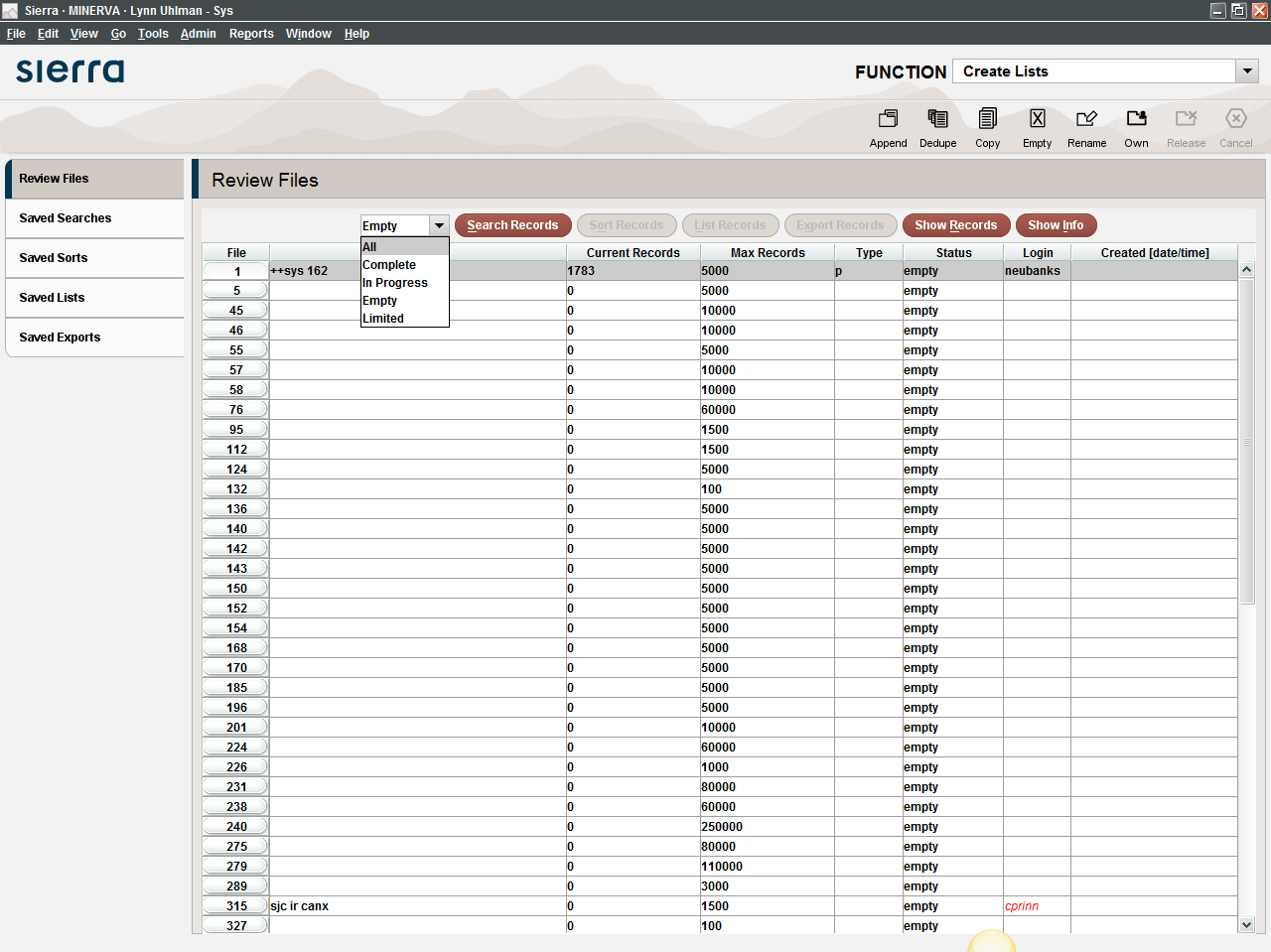
**Example:**



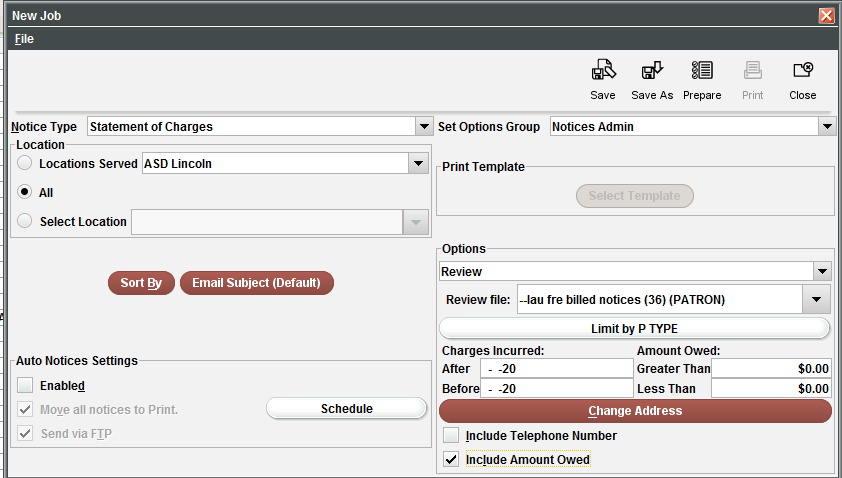
1. In line 1 of the parameters:

(Double click the parameter boxes to see the available options.)

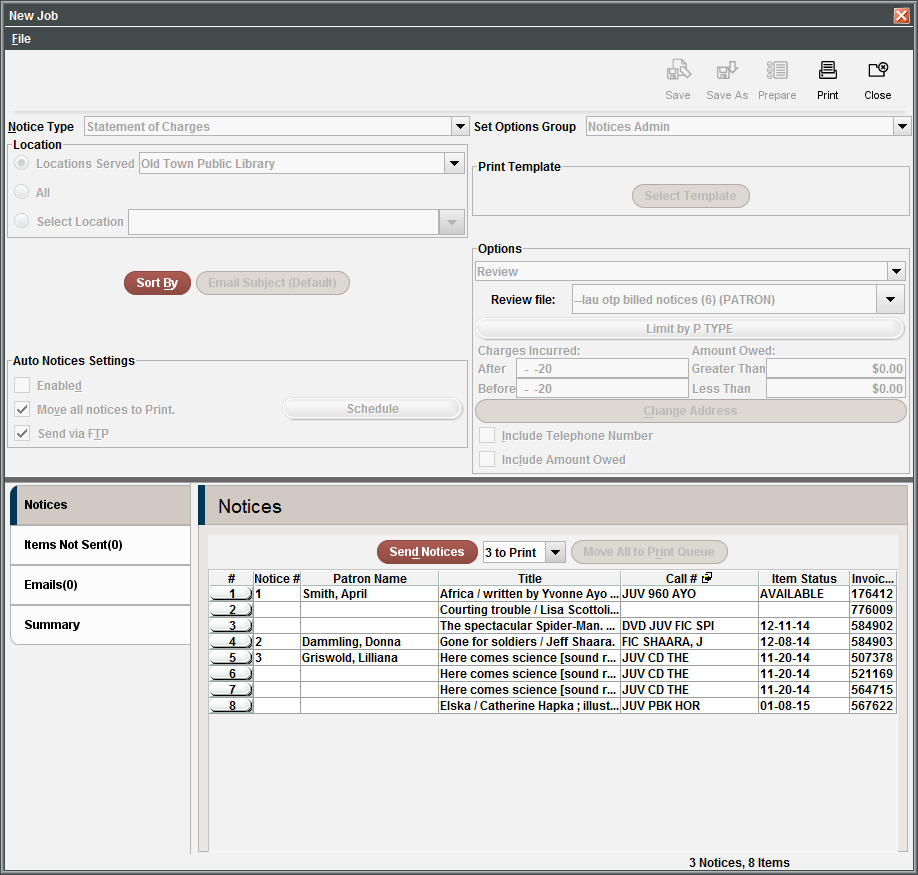
1. *Type* to ***Item*** - ***i***
2. *Field* to ***ODUE DATE*** – ***73***  or whichever PCode you use to classify your non-resident patrons.
3. *Condition* to ***equal to*** - ***= (****alternatively, if you are looking for the time period equal to and prior to today,**choose* ***less than & equal to <=****).*
4. *Value A* to today’s date
5. Once your screen looks similar to the above, click on the ***Search*** button.



1. Next, change the ***Review*** ***File*** view to ***All*** or ***Limited***.
2. Find your review file and check the ***Status*** column. If it is complete, you can now work with the list.
3. Change the ***Function*** to ***Notices***
4. Create a ***Notices*** job for ***Statement*** ***of*** ***Charges***.
5. Under ***Options***, make sure to set the drop-down menus to:
6. ***Review*** in the first drop-down.
7. Select your review file name in the second drop-down menu.
8. If you don’t want charges or fees from other dates to appear on the statement, change the ***Charges Incurred After*** date to the previous day.
9. Your screen should look similar to the following:



1. Select ***Prepare***.
2. The bottom half of the screen should look similar to below:



1. Click ***Send*** ***Notices***. \*\* You can send the print notices to the local printer or select the email notices to go to the patron’s email --OR-- you can switch the view to the email notices and select the ***Move*** ***All to Print Queue*** button. This allows you to print all notices to the local printer.
2. Once they have been sent, the following pop-up will appear:



1. Select ***Yes*** or ***No***. This really doesn’t matter in this instance since the data was grabbed from a system table, but from the review file you created.
2. The printouts should look similar to the following:

