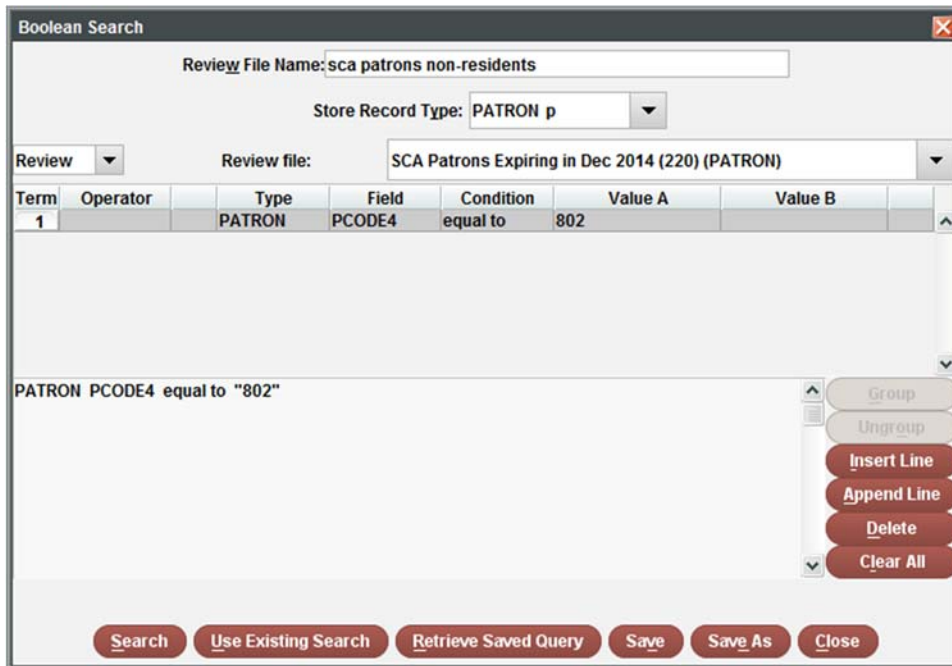


The following directions have been extracted from the Create Lists manual for the purpose of training. For a more concise and regularly updated information on Create Lists, please find the manual at <http://www.maineinfonet.org/supportportal/training/create-lists/>.

## 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.

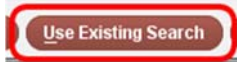


4. Name the **Review File**.
5. Select the **Store Record Type**. Remember this is dependent on the record links (refer to [Record Links](#)), so the file you wish to create a review on has to be either the exact record type or a linked record type.
6. Change the **Range** to **Review**.
7. In the **Review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

8. Enter the search parameters.
9. 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.



Existing Boolean Searches

Store Record Type: ITEM i

index ▼ BARCODE (b) ▼ 30129000000000 to 30129999999999

Term	Operator	Type	Field	Condition	Value A	Value B
1		BIBLIOGRAPHIC	MARC Tag 24...	has	season	

BIBLIOGRAPHIC MARC Tag 245jn has "season"

File	Name	Current Records	Max Records	Type	Status	Login	Created [date/t...
22	YPL large prin...	55	5000	i	complete	fdehler	09-23-2014 / 1...
23	apl 245##jn	103	5000	i	complete	luhman	12-23-2014 / 1...
24	mgw titles m...	312	5000	b	complete	cdamon	09-15-2014 / 1...
25	SPB JUV NF 1...	1558	5000	i	complete	ssamberg	12-20-2014 / 1...

Use Cancel

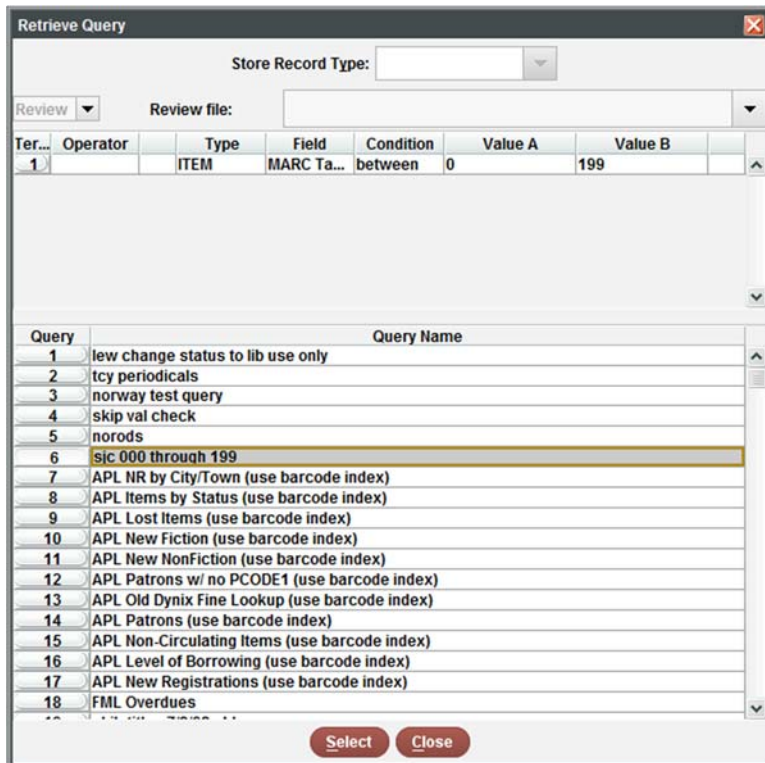
7. Click the **Use** button.
8. When ready, click the **Search** button to run the list.

## 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.



6. Scroll through the search list and select the list to be used.
7. Click the **Select** button.
8. When ready, click the **Search** button to run the list.



Ter...	Operator	Type	Field	Condition	Value A	Value B
1		ITEM	MARC Ta...	between	0	199

Query	Query Name
1	few change status to lib use only
2	tcy periodicals
3	norway test query
4	skip val check
5	norods
6	sjc 000 through 199
7	APL NR by City/Town (use barcode index)
8	APL Items by Status (use barcode index)
9	APL Lost Items (use barcode index)
10	APL New Fiction (use barcode index)
11	APL New NonFiction (use barcode index)
12	APL Patrons w/ no PCODE1 (use barcode index)
13	APL Old Dynix Fine Lookup (use barcode index)
14	APL Patrons (use barcode index)
15	APL Non-Circulating Items (use barcode index)
16	APL Level of Borrowing (use barcode index)
17	APL New Registrations (use barcode index)
18	FIML Overdues

## Export Records

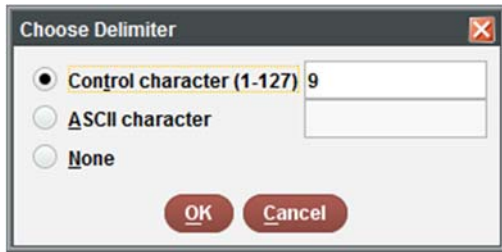
The Export Records button allows the user to export a review files select data in .txt format.

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.

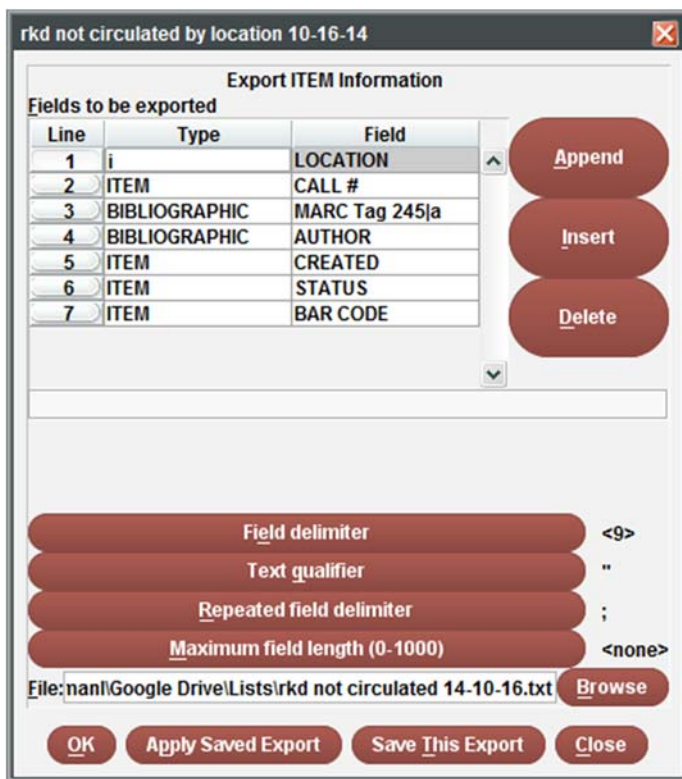
1. Select the **Review File** to be exported.
2. Click the **Export Records** button.
3. Enter the fields that you would like exported. Use **Append** to add lines to the end of the list and use **Insert** to add a line in between parameters.

The screenshot shows a dialog box titled "Export ITEM Information" with a table for "Fields to be exported". The table has three columns: "Line", "Type", and "Field". The first row has "1" in the "Line" column. To the right of the table are three buttons: "Append", "Insert", and "Delete". Below the table are four input fields: "Field delimiter" (set to "<9>"), "Text qualifier" (set to """), "Repeated field delimiter" (set to ";"), and "Maximum field length (0-1000)" (set to "<none>"). At the bottom, there is a "File:" label, a "Browse" button, and four buttons: "OK", "Apply Saved Export", "Save This Export", and "Browse".

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



6. Click **OK**.
7. Select the **Browse** button.
8. Enter a name and **Save** the file in an easy to find location.
9. Once done, your **Export** parameters should look similar to this:

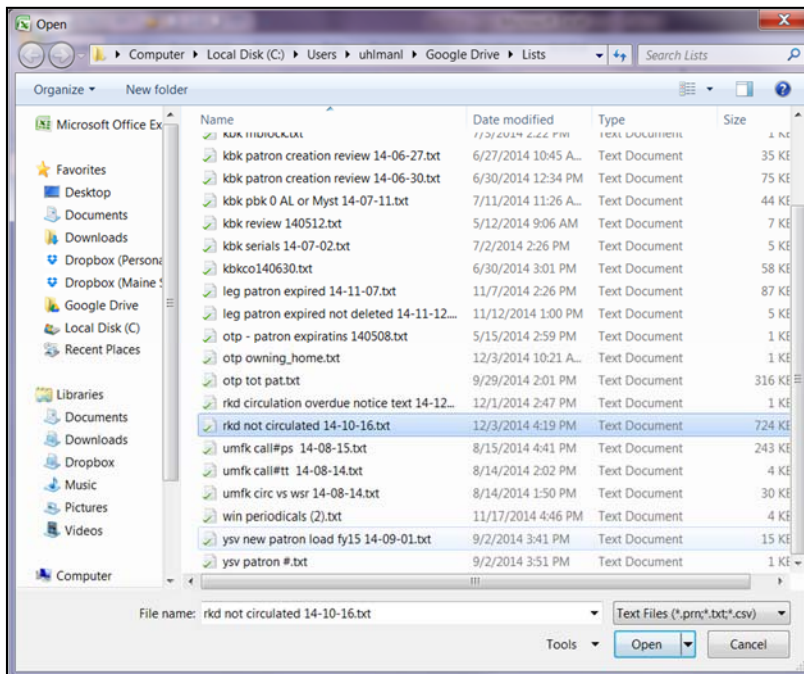


10. If everything looks good, click **OK**.

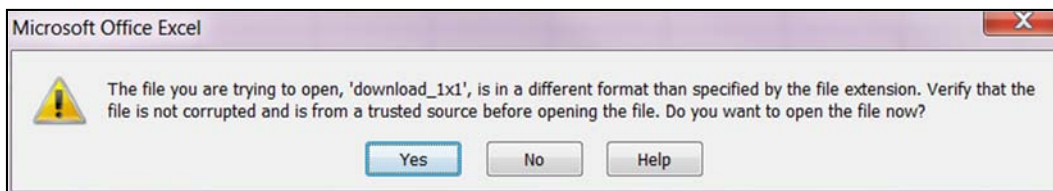
## Manipulating an exported list

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:

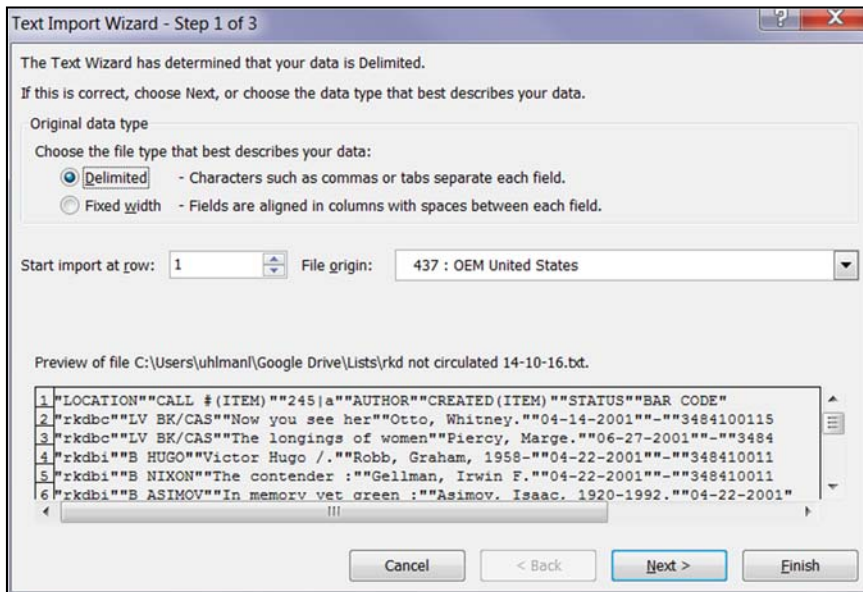
1. Open **Excel**.
2. Select **Open**.
3. Browse for the exported review file and open it.



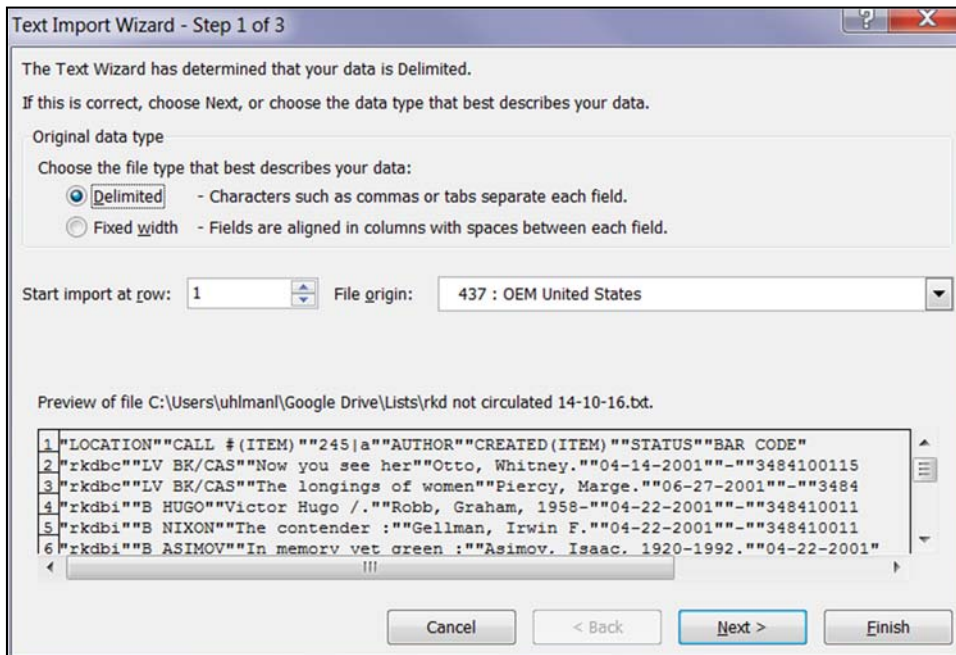
4. If you receive this message, select **Yes**. Otherwise, move on to #5.



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



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



7. Click **Finish**.

8. The list should now be in an easily viewed format and editable.

	A	B	C	D	E	F	G	H
1	LOCATION	CALL #	ITE 245	a	AUTHOR	CREATED	STATUS	BAR CODE
2	rkd	bc	LV BK/CAS	Now you	Otto, Whi	#####	-	3.48E+13
3	rkd	bc	LV BK/CAS	The longir	Piercy, Ma	#####	-	3.48E+13
4	rkd	bi	B HUGO	Victor Hug	Robb, Gra	#####	-	3.48E+13
5	rkd	bi	B NIXON	The conte	Gellman, l	#####	-	3.48E+13
6	rkd	bi	B ASIMOV	In memor	Asimov, Is	#####	-	3.48E+13
7	rkd	bi	B DEMILLE	Cecil B. De	Higham, C	#####	-	3.48E+13
8	rkd	bi	B DOUGLA	Go East, y	Douglas, V	#####	-	3.48E+13
9	rkd	bi	B FRANKLI	Benjamin	Van Dorer	#####	-	3.48E+13
10	rkd	bi	B FRANKLI	Benjamin	Tourtellot	#####	-	3.48E+13
11	rkd	bi	B FROST	Frost :	Pritchard,	#####	-	3.48E+13
12	rkd	bi	B FROST	Robert Frc	Thompsor	#####	-	3.48E+13
13	rkd	bi	B GOLDW	Goldwater	Goldwater	#####	-	3.48E+13
14	rkd	bi	B IACOCC	Iacocca :	Iacocca, L€	#####	-	3.48E+13
15	rkd	bi	B KENNED	JFK, reckle	Hamilton,	#####	-	3.48E+13

9. 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:**

Index    BARCODE (b)    3484100000000    to    3484199999999

8. Leave the parameters blank.

Boolean Search

Review File Name: rkd location count 10-16-14

Store Record Type: ITEM i

Index    BARCODE (b)    3484100000000    to    3484199999999

Term	Operator	Type	Field	Condition	Value A	Value B
------	----------	------	-------	-----------	---------	---------

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

Review Files

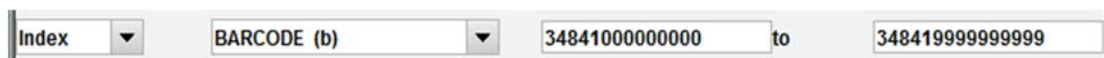
File	++sys 162	complete
1		
5		
45		

280    rkd item count 10-16-14    60437    110000    i    complete    luhman    10-16-2014 / 10:08:31

## 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:



The screenshot shows a search interface with two dropdown menus and two text input boxes. The first dropdown menu is set to 'Index', the second to 'BARCODE (b)'. The first text box contains '34841000000000' and the second contains '34841999999999', with 'to' between them.

8. In line 1 of the parameters:  
(Double click the parameter boxes to see the available options.)
  - a. Type to **Item - i**
  - b. Field to **TOT CHKOUT - 76**
  - c. Condition to **Equal to - =**
  - d. Value A to **0**
9. Click the **Append Line** button.
10. In line 2 of the parameters:
  - a. Type to **Item - i**
  - b. Field to **CREATED - 83**
  - c. Condition to **less than or equal to - <=**
  - d. Value A to **mmddy** (If you don't want anything more recent than January 1, 2013 then enter 12-31-2012)

Boolean Search

Review File Name: rkd not circulated by location 10-16-14

Store Record Type: ITEM i

Index: BARCODE (b) 3484100000000 to 3484199999999

Term	Operator	Type	Field	Condition	Value A	Value B
1		ITEM	TOT CHKOUT	equal to	0	
2	AND	ITEM	CREATED	less than or...	12-31-2012	- -

11. Once your screen looks like the above, click on the **Search** button.

12. Next, change the **Review File** view to **All** or **Limited**.

Review Files

File	Status
1	++sys 162
5	
45	
46	

Empty

- All
- Complete
- In Progress
- Empty
- Limited

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

63	rkd not circulated by location 10-16-14	6882	20000	j	complete	luhman	10-16-2014 / 11:13'32
----	---	------	-------	---	----------	--------	-----------------------

## 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:

Index	▼	BARCODE (b)	▼	34240000000000	to	34240999999999
-------	---	-------------	---	----------------	----	----------------

8. In line 1 of the parameters:  
(Double click the parameter boxes to see the available options.)
  - a. Type to **Item - i**
  - b. Field to **ODUE DATE – 73** or whichever PCode you use to classify your non-resident patrons.
  - c. Condition to **equal to - =**
  - d. Value A to today's date
9. In line 2 of the parameters:  
(Double click the parameter boxes to see the available options.)
  - e. Type to **Item - i**
  - f. Field to **# OVERDUE – 72** or whichever PCode you use to classify your non-resident patrons.
  - g. Condition to **greater than or equal to - >=**
  - h. Value A to **1**
10. In line 3 of the parameters:  
(Double click the parameter boxes to see the available options.)
  - i. Type to **Item - i**
  - j. Field to **STATUS – 88** or whichever PCode you use to classify your non-resident patrons.
  - k. Condition to **not equal to - !=**
  - l. Value A to **n**

Boolean Search

Review File Name: --lau cml odue notices

Store Record Type: ITEM i

Index: BARCODE (b) 3424000000000 to 3424099999999

Term	Operator	Type	Field	Condition	Value A	Value B
1		ITEM	ODUE DATE	equal to	12-29-2014	--
2	AND	ITEM	# OVERDUE	greater tha...	1	
3	AND	ITEM	STATUS	not equal to	n	

11. Once your screen looks similar to the above, click on the **Search** button.

12. Next, change the **Review File** view to **All** or **Limited**.

Review Files

File	Status
1	++sys 162
5	
45	

Empty

All

Complete

In Progress

Empty

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 **2xxxx00000000** and your ending barcode range **2xxxx99999999** in the text boxes.

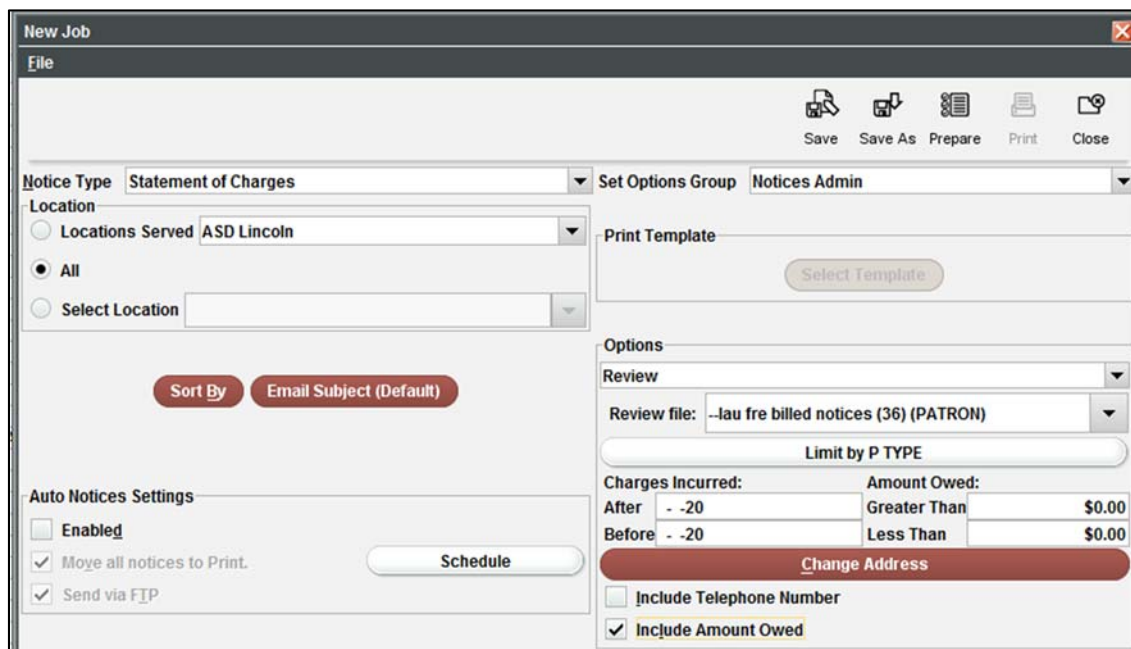
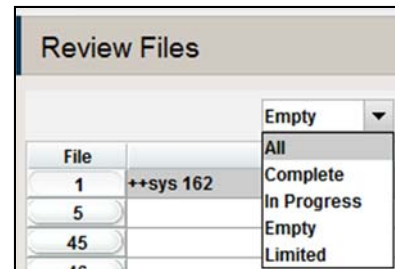
**Example:**

Index BARCODE (b) 2397200000000 to 2397299999999

8. In line 1 of the parameters:
 

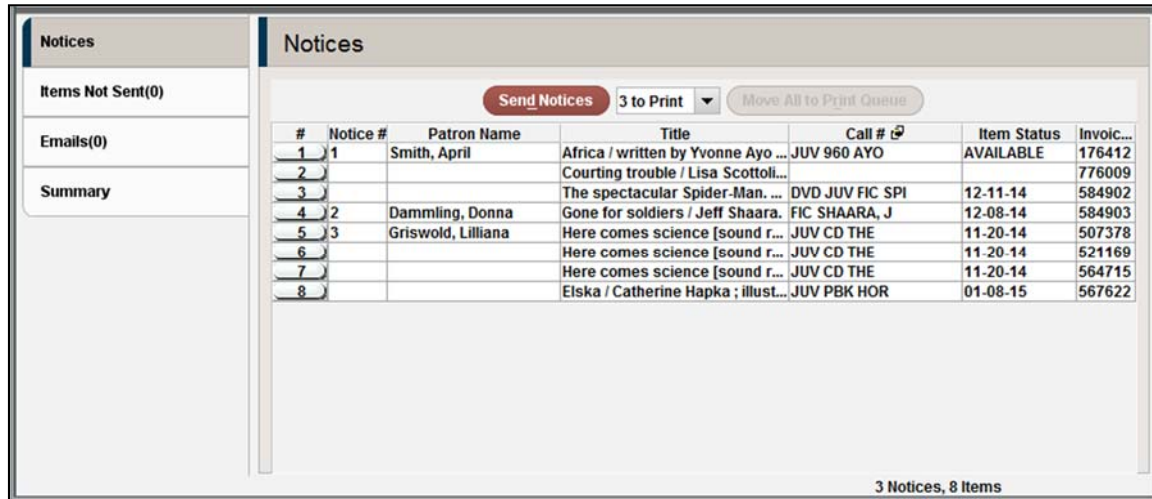
(Double click the parameter boxes to see the available options.)

  - m. Type to **Item - i**
  - n. Field to **ODUE DATE – 73** or whichever PCode you use to classify your non-resident patrons.
  - o. Condition to **equal to =** (alternatively, if you are looking for the time period equal to and prior to today, choose **less than & equal to <=**).
  - p. Value A to today's date
9. Once your screen looks similar to the above, click on the **Search** button.
10. Next, change the **Review File** view to **All** or **Limited**.
11. Find your review file and check the **Status** column. If it is complete, you can now work with the list.
12. Change the **Function** to **Notices**
13. Create a **Notices** job for **Statement of Charges**.
15. Under **Options**, make sure to set the drop-down menus to:
  - a. **Review** in the first drop-down.
  - b. Select your review file name in the second drop-down menu.
  - c. 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.
16. Your screen should look similar to the following:



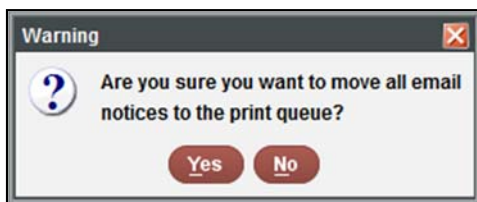
17. Select **Prepare**.

18. The bottom half of the screen should look similar to below:



19. 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.

20. Once they have been sent, the following pop-up will appear:



21. 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.

22. The printouts should look similar to the following:

04-24-15 02:16PM

Freeport Community Library  
10 Library Drive  
Freeport, ME 04032



Freeport, ME 4032

Below you will find a summary of billed items, fines and any other charges currently attached to your patron record at the library. Please contact the library as soon as possible to resolve this matter. Thank you

Inv #	Description	Amount
686991 REPLACEMENT	I took the moon for a walk /	\$16.95
TOTAL		\$16.95

NOTE: Total outstanding fines and bills \$16.95  
98