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Sierra  
Create Lists Training

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This manual is a modified version of a **Create Lists Manual** created by Steve Hesser, MCFLS who based his manual upon Stephanie Zimmerman of the Library System of Lancaster County, Pennsylvania.

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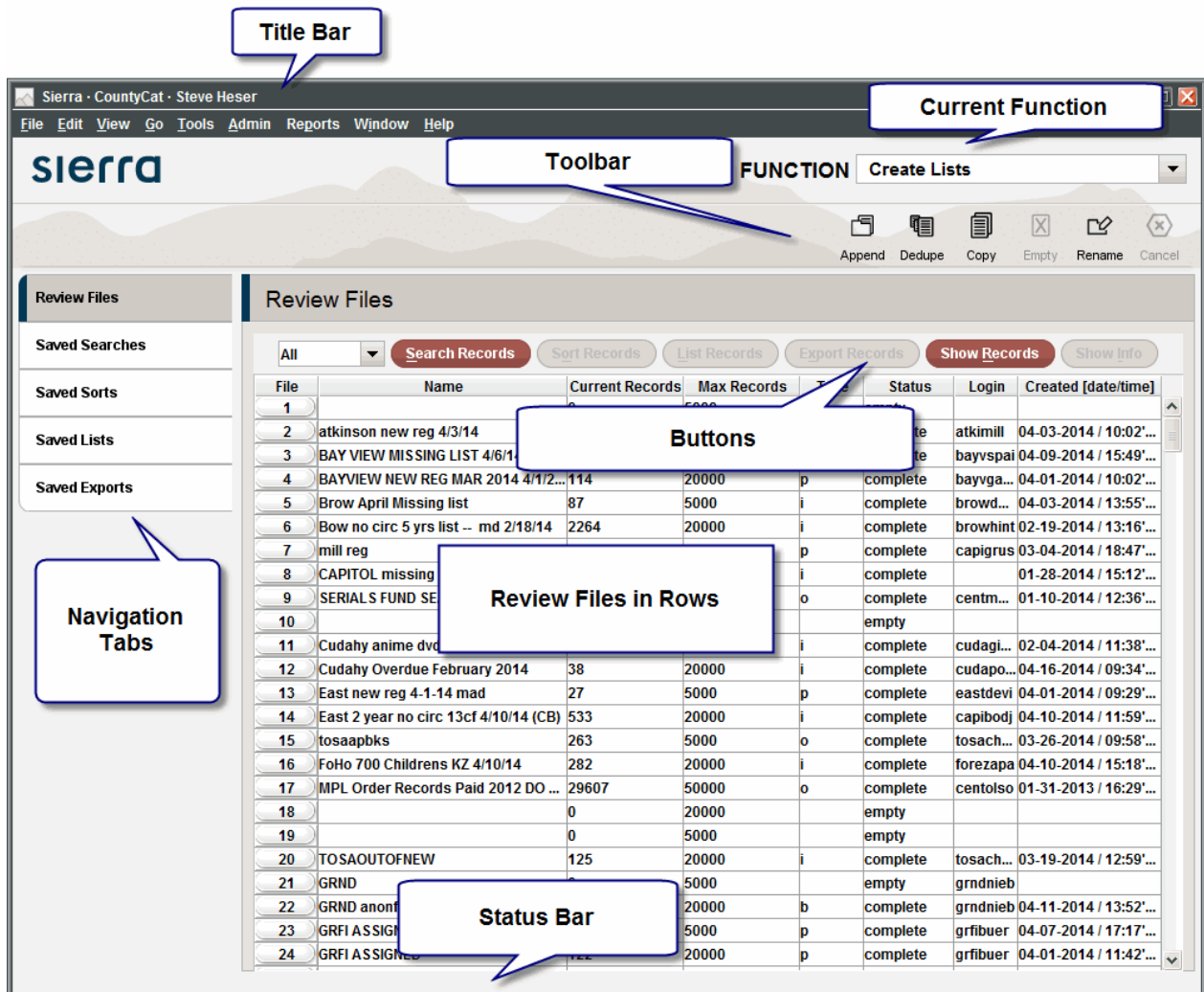
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# Innovative Sierra Training Website

<https://innovative.libguides.com/Sierra>

## The Create Lists Main Window

The **title bar** of the main window displays the Sierra module (Create Lists).



The **current function** is indicated below the title bar in the dropdown menu called FUNCTION. In the above example, the current circulation mode is **Create Lists**.

The **navigation tabs** contains buttons for changing the current view; the button representing the current view is **Review Files**.

The **toolbar** icons display the actions you can perform in the current mode or with the current record. The action cannot be performed when the icon is grayed out.

The **buttons** are used to perform various actions during list creation.

The **review files** are shown in the rows of the table.

The **status bar** is the last line of the main window. The status bar contains supplementary information about the data displayed in the window.

# The Create Lists Toolbar

## The Create Lists Toolbar

The toolbar icons appear to the right of the current mode. Disabled icons are dimmed.



### **Append**

Add records to an existing review file (see [Appending Records to a Review File](#) for more information).

**Append** is also available from the **Tools** menu.

### **Dedupe**

Remove duplicate records from an existing review file. Remove Duplicates is also available from the Tools menu.

### **Copy**

Copy the selected review file to another review file. **Copy** is also available from the **Tools** menu.

### **Empty**

Empty the selected review file. **Empty** is also available from the **Tools** menu.

### **Rename**

Rename the selected review file. **Rename** is also available from the **Tools** menu.

### **Cancel**

Cancels the current operation and stops the review file from accumulating records.

## Creating a New Review File

Once you know what kind of list you need, you are ready to create a new review file.

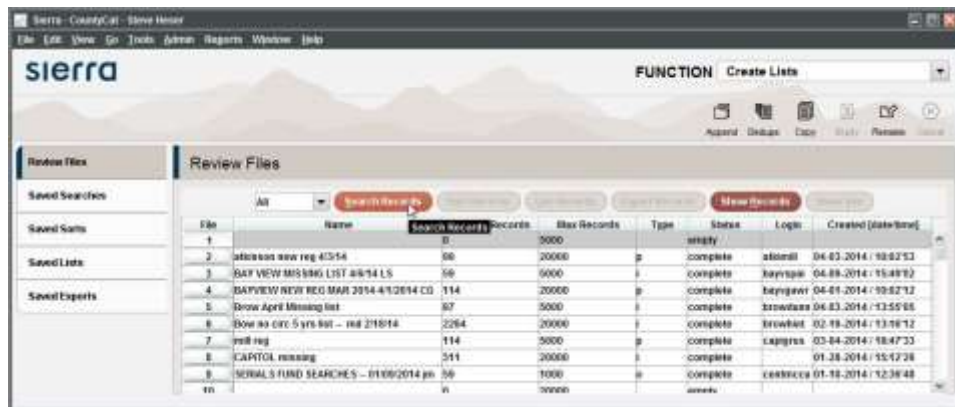
1. Choose an empty review file by selecting and highlighting its row. You can also choose an existing review file to erase overwrite (Generally, only overwrite or delete files you created!).
2. To find empty review files click on the Current Records column title, to cause the review files to be sorted by current records (how many records are in a review file).

File #	Name	Current Records	Max Records	Type
1	AMAZON ORDERS	12	100	0
2	12/14/2020 GOBI ORDERS	3	100	0
3	12/3/2020 DBA INVOICE FILE #5520201203	2	100	0
4	bpci periodicals	44	100	0

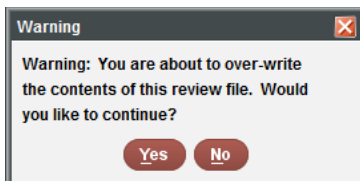
This will bring the empty reviews to the top of window:

File	Name	Current Records	Max Records	Type
96		0	2500	
139		0	5000	
140		0	5000	

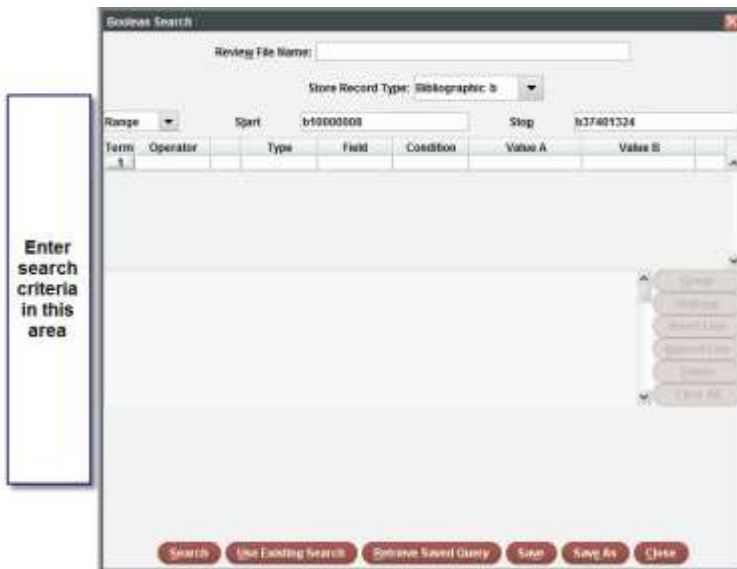
3. Choose **Empty** from the **drop-down menu** of review file types.
4. Select a row by clicking anywhere in the row.
5. Choose the **Search Records** button from the Review Files tab.



- 6.
7. If you chose a review file that is not empty, the system warns that you will overwrite the existing file. Choose Yes to overwrite the file, or choose No to return to the list of review files.



8. The system displays the Boolean Search window:



9. Enter your search criteria (see Specifying Search Criteria below for more information).
10. Begin your search by clicking the **Search** button at the bottom of the window.

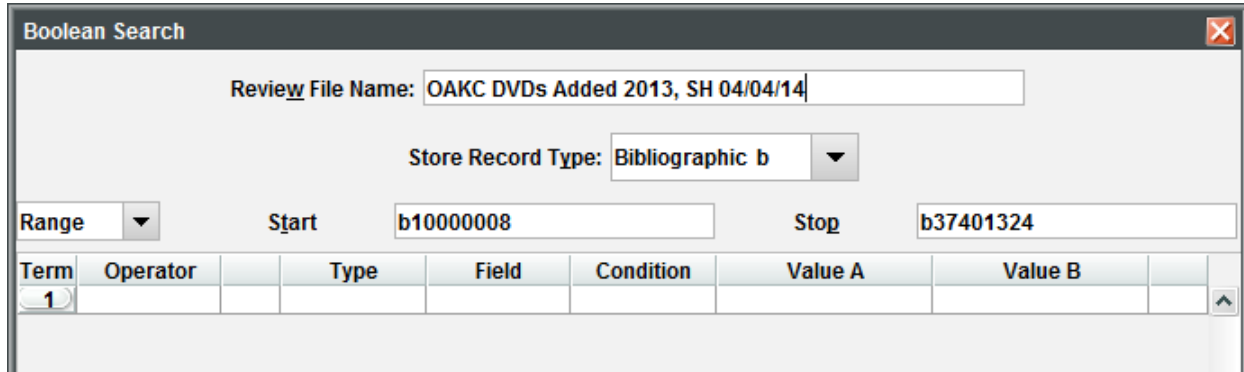
## Specifying Search Criteria

This section goes over the various areas of the Boolean Search window.

### Naming a Review File

Enter a name for the file related to the task you are doing.

(This example steps through creating a list of DVD items added to Oak Center branch location)



The screenshot shows the Boolean Search window with the following fields and values:

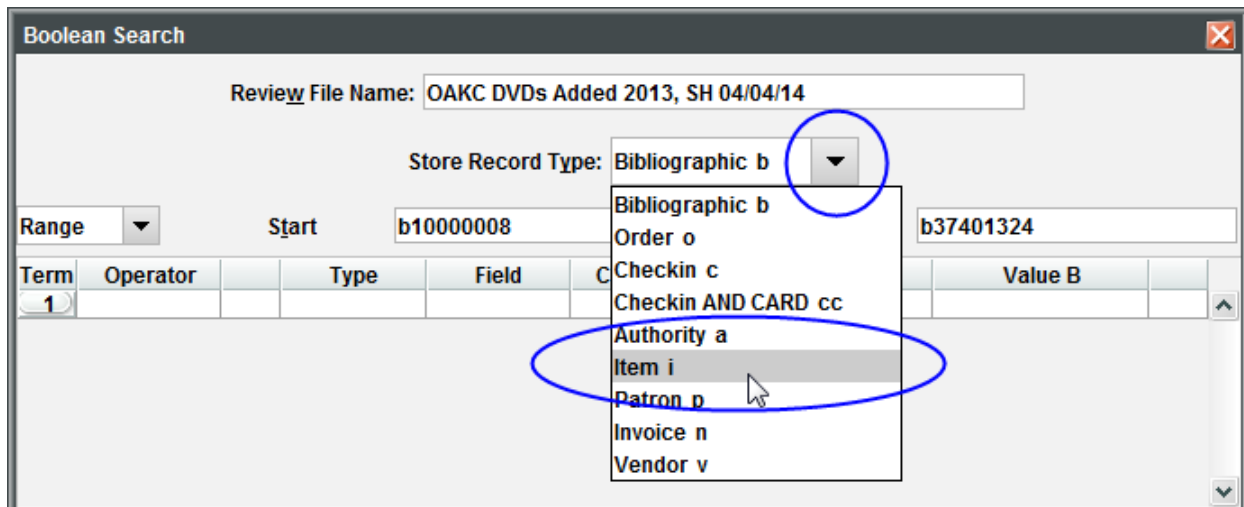
- Review File Name: OAKC DVDs Added 2013, SH 04/04/14
- Store Record Type: Bibliographic b
- Range: [dropdown]
- Start: b10000008
- Stop: b37401324

Term	Operator	Type	Field	Condition	Value A	Value B
1						

### Selecting a Record Type

Here is where you specify the type of records you want to collect in the review file. This area is important because it will determine what types of records and what fields within those records you can search on.

1. Click the drop-down arrow in the **Store Record Type** field (or hit the down arrow key on your keyboard).
2. Choose the type of record you want to see in your list by clicking on its name (see [Record Type](#) for a list).



The screenshot shows the Boolean Search window with the Store Record Type dropdown menu open. The menu options are:

- Bibliographic b
- Order o
- Checkin c
- Checkin AND CARD cc
- Authority a
- Item i
- Patron p
- Invoice n
- Vendor v

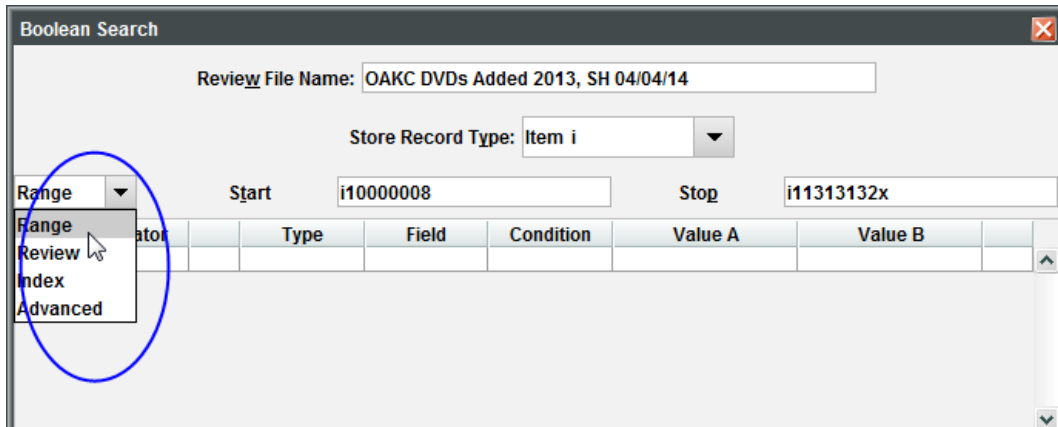
The 'Item i' option is highlighted, and a mouse cursor is pointing at it. The 'Store Record Type' field is circled in blue, and the dropdown menu is also circled in blue.



## Setting a Range for a Search

Now that Sierra knows what types of records you are looking for, you need to limit your list.

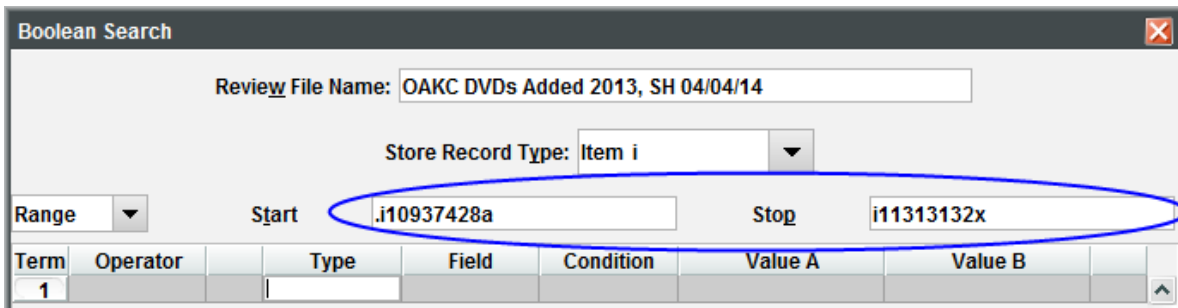
1. In the **pull-down menu**, specify the **range**, **review** file, **index**, or **advanced** keyword(s) to search. Click the drop-down arrow to see your choices (or hit the down arrow key on your keyboard).
2. Choose the one you want to use by clicking on its name.



The screenshot shows the 'Boolean Search' window. The 'Review File Name' field contains 'OAKC DVDs Added 2013, SH 04/04/14'. The 'Store Record Type' is set to 'Item i'. The 'Start' field contains 'i10000008' and the 'Stop' field contains 'i11313132x'. A dropdown menu is open over the 'Range' field, showing options: 'Range', 'Review', 'Index', and 'Advanced'. A blue circle highlights the dropdown menu.

### A) Range

Search through a range of records; the first and last record number of the type you want to search will automatically display in the **Start** and **Stop** text boxes. This is what is being used in our example. Below you see the range from first item number in the database to last item number.



The screenshot shows the 'Boolean Search' window. The 'Review File Name' field contains 'OAKC DVDs Added 2013, SH 04/04/14'. The 'Store Record Type' is set to 'Item i'. The 'Start' field contains '.i10937428a' and the 'Stop' field contains 'i11313132x'. A blue circle highlights the 'Start' and 'Stop' fields. The 'Range' dropdown menu is set to 'Range'.

### B) Review

Select an existing review file by review file number. You can use one review file as the range for a new review file.



The screenshot shows the 'Boolean Search' window. The 'Review File Name' field contains 'OAKC DVDs Added 2013, SH 04/14/14'. The 'Store Record Type' is set to 'Item i'. The 'Review' dropdown menu is open, showing a list of review files. The first item is selected: '1. re reg oct 3 sm (179) (Patron)'. The 'Review file:' field contains '1. re reg oct 3 sm (179) (Patron)'. The 'Term' field contains '1'.

Term	Operator	Type	Field	Condition	Value A	Value B
1						

### C) Index

Search by author, title, call number, etc. Note that the drop-down menu for index choices varies depending on what record type you are searching. This screen shot shows the indices available for Item Records.

The screenshot shows a 'Boolean Search' window. At the top, the 'Review File Name' is 'OAKC DVDs Added 2013, SH 04/04/14'. Below it, 'Store Record Type' is set to 'Item i'. A table for search terms is visible, with a dropdown menu open for the first term. The dropdown lists the following indices: CALL NO (c), JOURNAL TITLE (j), AUTHOR (a), TITLE (t), SUBJECT (d), OCLC NO (o), ISBN/ISSN (i), and GOVT DOC # (g). The 'TITLE (t)' option is currently selected.

Index	Term	Operator	Field	Condition	Value A	Value B
CALL NO (c)	1					

### D) Advanced

Search by advanced keyword syntax – fields a: (author), t: (title), s: (subject), n: (note), adjacency, truncation, wildcards, proximity operators etc.

This screen shot shows a search for all items that have the word asthma in their subject line.

The screenshot shows a 'Boolean Search' window. The 'Review File Name' is 'Asthma books'. 'Store Record Type' is set to 'Item i'. The search mode is set to 'Advanced', and the search term is 's:asthma'. A table for search terms is visible, with the first term '1' in the 'Term' column.

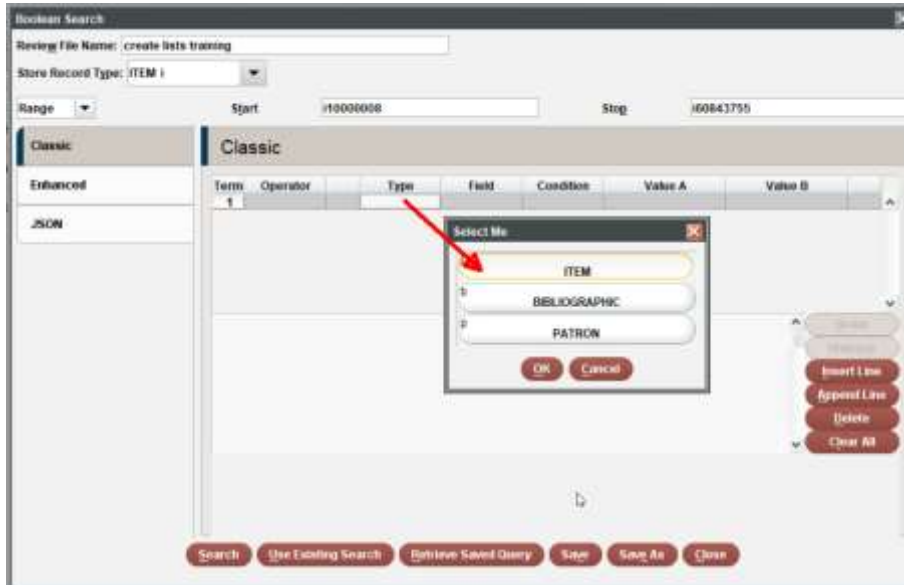
Term	Operator	Type	Field	Condition	Value A	Value B
1						

## Create a Search String

Here's where you build your search string, using fields of the type of record that you are searching, as well as fields of records that are attached to those records (see [Appendix A. The Law of One Hop](#)) for more information). This will help the system pull those particular records you want in your list from the database.

## Enter the Type of Record to Search

1. In the table for search criteria, double-click in the **Type** cell to see a list of choices. (Alternatively, if you know the field tag, just type that in the field or hit the down arrow key on your keyboard to see a list).
2. The record types offered will depend on the type of record you chose in the **Store Record Type** field. Here we are searching for item records and see the following options:



3. Highlight your choice and click **OK**, or Double-click your choice. (Note the field tag displays in the top left corner of the choice boxes).

## Enter the Field

4. Double-click in the **Field** cell to choose the field to search in. (Alternatively, if you know the field tag, just type that in the field or hit the down arrowkey on your keyboard to see a list).
5. Choices here will vary depending on the **Type** of record you chose to search in the previous steps. You can search fixed-length or variable-length fields of the record. Here we are searching for Item Record Fields and see the following **Select Dialog Box**:

The screenshot shows the 'Boolean Search' dialog box. At the top, there is a 'Review File Name' field with the text 'create lists training'. Below it is a 'Store Record Type' dropdown menu set to 'ITEM i'. There are 'Range', 'Start' (with value '11000008'), and 'Stop' (with value '160843755') fields. On the left, there are three tabs: 'Classic' (selected), 'Enhanced', and 'JSON'. The main area is a table with columns: Term, Operator, Type, Field, Condition, Value A, and Value B. The 'Field' column is highlighted, and a 'Select Me' dialog box is open over it. The 'Select Me' dialog box has three tabs: 'Data Fields', 'Holds', and 'Fines'. It contains a grid of field tags. A red arrow points from the 'Field' cell in the main table to the 'LOCATION' field tag in the 'Select Me' dialog box. The 'LOCATION' field tag is highlighted. At the bottom of the 'Select Me' dialog box are 'OK' and 'Cancel' buttons. At the bottom of the main dialog box are buttons for 'Search', 'Use Existing Search', 'Retrieve Saved Query', 'Save', 'Save As', and 'Close'.

Term	Operator	Type	Field	Condition	Value A	Value B
1		ITEM				

Data Fields			Holds			Fines		
67	LPATRON	68	LCHKIN	70	IN LOC			
71	# RENEWALS	72	# OVERDUE	73	ODUE DATE			
74	IUSE3	75	RECAL DATE	76	TOT CHKOUT			
77	TOT RENEW	78	LOUTDATE	79	LOCATION			
87	LOANRULE	88	STATUS	93	INTL USE			
94	COPY USE	97	IMESSAGE	108	OPACMSG			
109	YDCIRC	110	LYRCIRC	81	RECORD #			
83	CREATED	84	UPDATED	85	REVISIONS			

6. Highlight the field you want and click **OK**, or Double-click your choice. (Note the field tag displays in the top left corner of the choice boxes)

In our example, we want to make a list of items in Location mjuu, CRC Juvenile Literature, so the criteria needs to limit those ITEM LOCATION. We will double-click the **I TYPE** data field to start adding these I TYPE values.

### Choose a Boolean Condition

For each fixed- or variable-length field you want to search, you can specify a Boolean condition that the field must meet. Boolean conditions are terms or symbols that tell the system the relationship between the fields that you want to search and the data in that field. For example, which items have an **I Type** (the field) equal to **19** (the data or value)?

7. Double-click in the **Condition** cell to see a list of Boolean conditions to choose from. (Alternatively, if you know the field tag, just type that in the field or hit the down arrow key on your keyboard to see a list).

The screenshot shows the 'Boolean Search' window. At the top, there is a 'Review File Name' field containing 'OAKC DVDs Added 2013, SH 04/04/14'. Below it is a 'Store Record Type' dropdown set to 'Item i'. A 'Range' dropdown is set to 'Start' with the value 'i10937428a' and 'Stop' with the value 'i113132037'. A table below shows a search term '1' with 'Operator' blank, 'Type' 'Item', and 'Field' 'I TYPE'. The 'Condition' cell is empty. A 'Select Me' dialog box is open, displaying a grid of Boolean conditions. The 'equal to' condition is highlighted with a red arrow. The 'OK' button is circled in blue. At the bottom of the main window are buttons for 'Search', 'Use Existing Search', 'Retrieve Saved Query', 'Save', 'Save As', and 'Close'.

Term	Operator	Type	Field	Condition	Value A	Value B
1		Item	I TYPE			

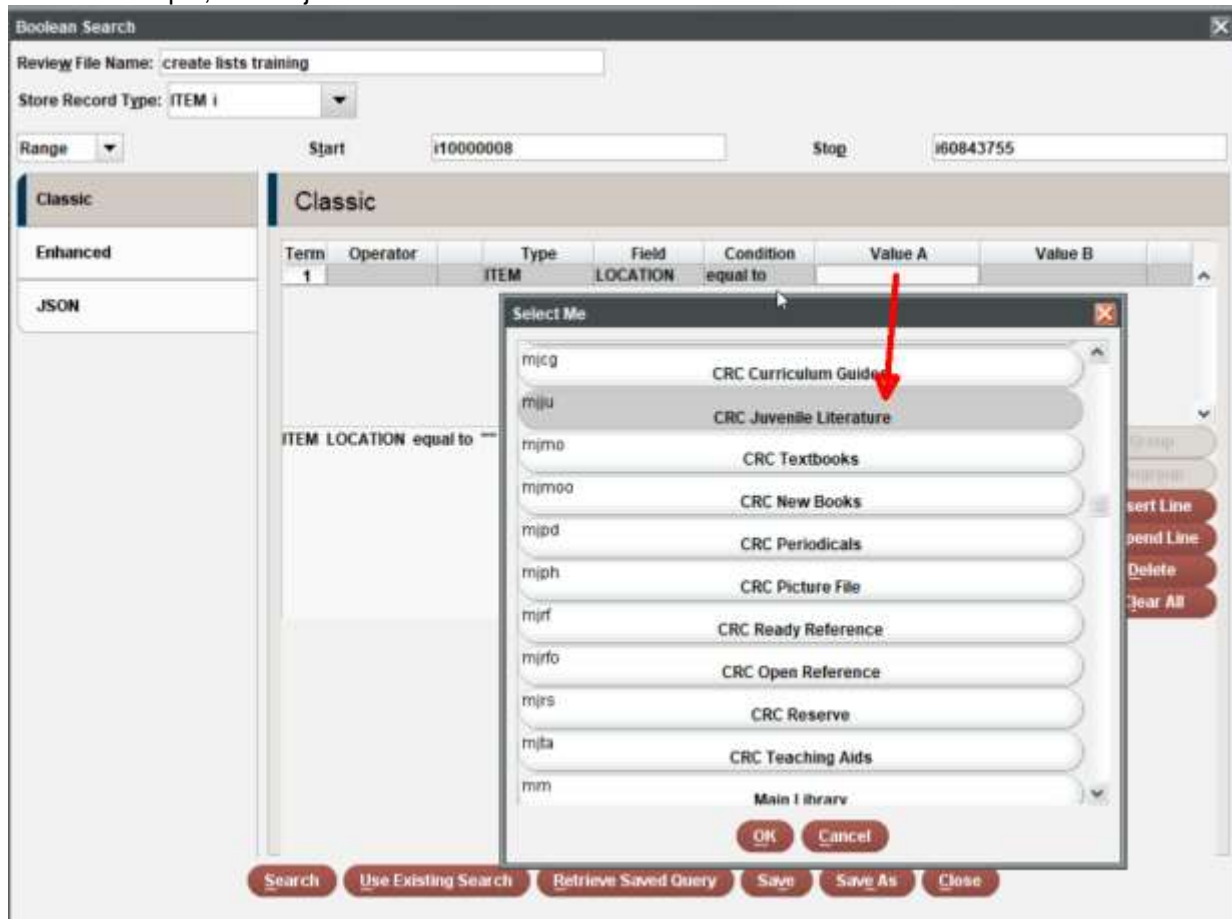
Condition	Symbol
greater than	>
less than	<
greater than or equal to	>=
less than or equal to	<=
not within	N
has	H
At Least one Field doesn't have	O
starts with	^
equal to	=
not equal to	!=
between	W
All Fields don't have	A
matches	R
ends with	\$

8. Highlight the condition you want to use and click **OK**, or Double-click the condition you want to use. (Note the field tag displays in the top left corner of the choice boxes)
9. For our example, we will double-click **= equal to**.

### Enter Values

10. Enter a value in the **Value A** cell. For a date or fixed-length field, you must enter a valid value. Most of the time, the easiest method is to just type your value in. You may double-click the field if you need to search for the value (or hit the down arrow key on your keyboard to see a list). This option is not always available; it depends on what you are searching for.

In this example, we will just double-click the Value A area to locate our first **LOCATION** value



If you chose the "between" or "not within" condition, you must enter a second value in the **Value B** cell.

#### 11. Next we would want to limit to Bibliographic records that are not marked to be deleted. Specifying Additional Search Terms

You can specify additional search terms linked to the existing terms with "and" or "or":

1. Specify your search criteria for the first term (see [Create a Search String](#) for more information).
2. Choose **Append Line** to add a search line after the highlighted line.  
Choose **Insert Line** to add a search term before the selected term.  
Terms are searched in the order that they are listed in the table.  
Note: The highlight always returns to the first line when you finish inputting terms and conditions in the current line and hit **Enter** on your keyboard. Be sure you are in the correct position before Appending or Inserting additional lines.

Boolean Search

Review File Name: OAKC DVDs Added 2013, SH 04/04/14

Store Record Type: Item i

Range: Start i10937428a Stop i113132037

Term	Operator	Type	Field	Condition	Value A	Value B
1		Item	ITYPE	equal to	19	
2	AND					

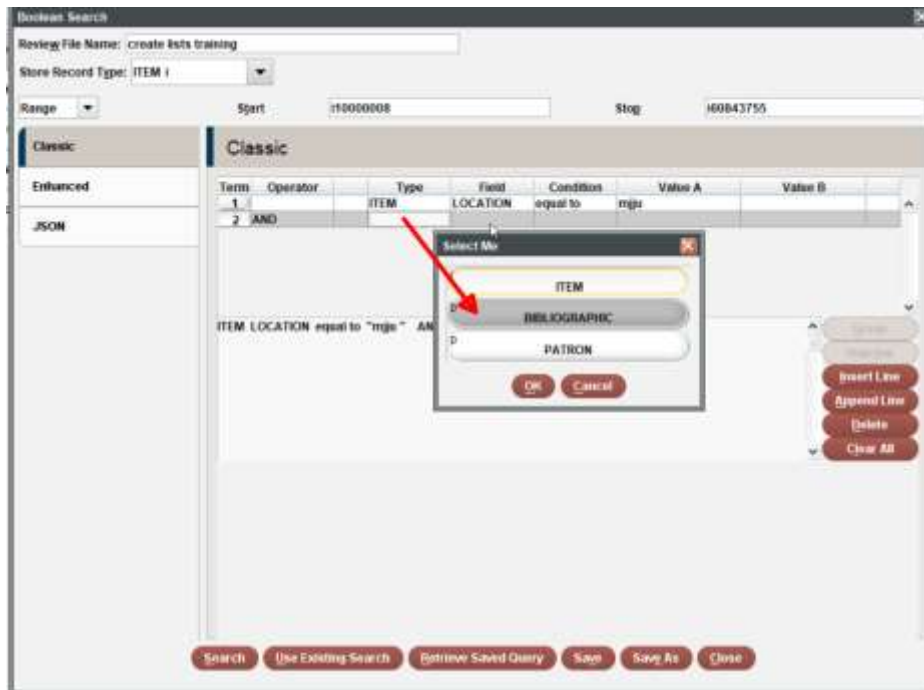
Item ITYPE equal to "19" AND

Group  
Ungroup  
Insert Line  
Append Line  
Delete  
Clear All

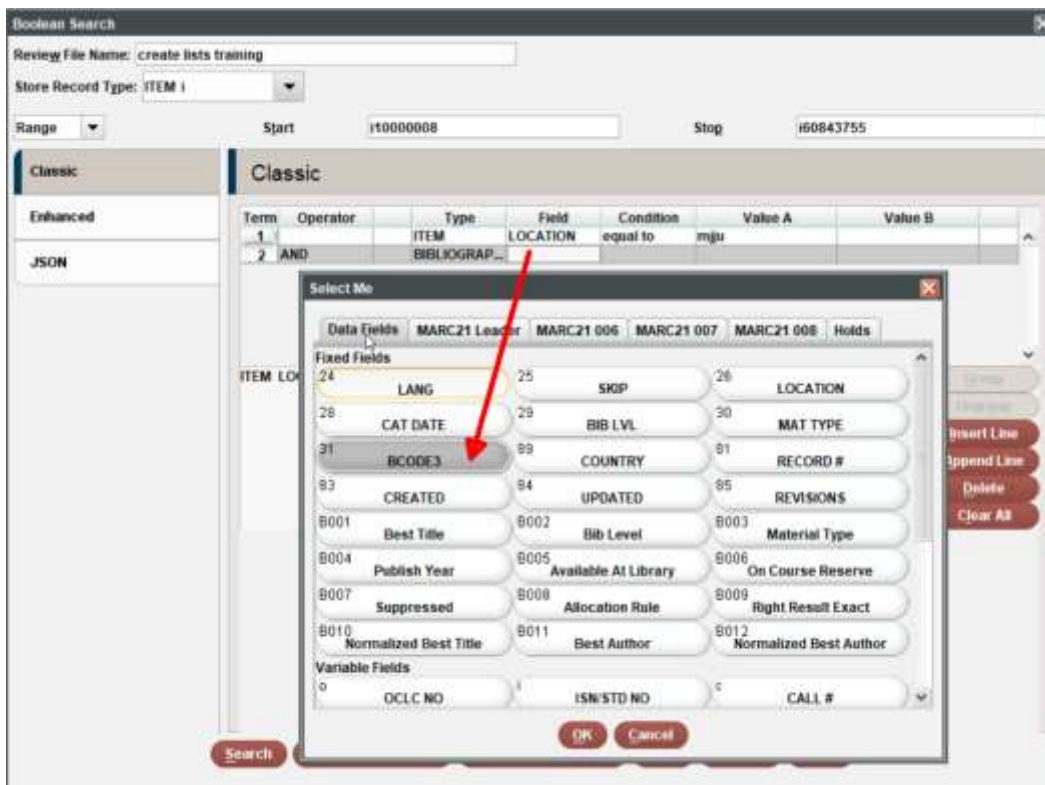
Search Use Existing Search Retrieve Saved Query Save Save As Close

- In the Operator cell of the new search term, choose "and" or "or" by double-clicking. The cell's Operator defaults to "and." You may also type the "a" or "o" into the cell.
- Specify the criteria for the new search term.
- To continue adding terms, select the row before or after which you want to add the new term, then repeat the process beginning with step 2. Or begin your search by choosing **Search**.

**Limit to Bibliographic records that can be viewed by the public.  
Bcode3 determines if a record displays to public**

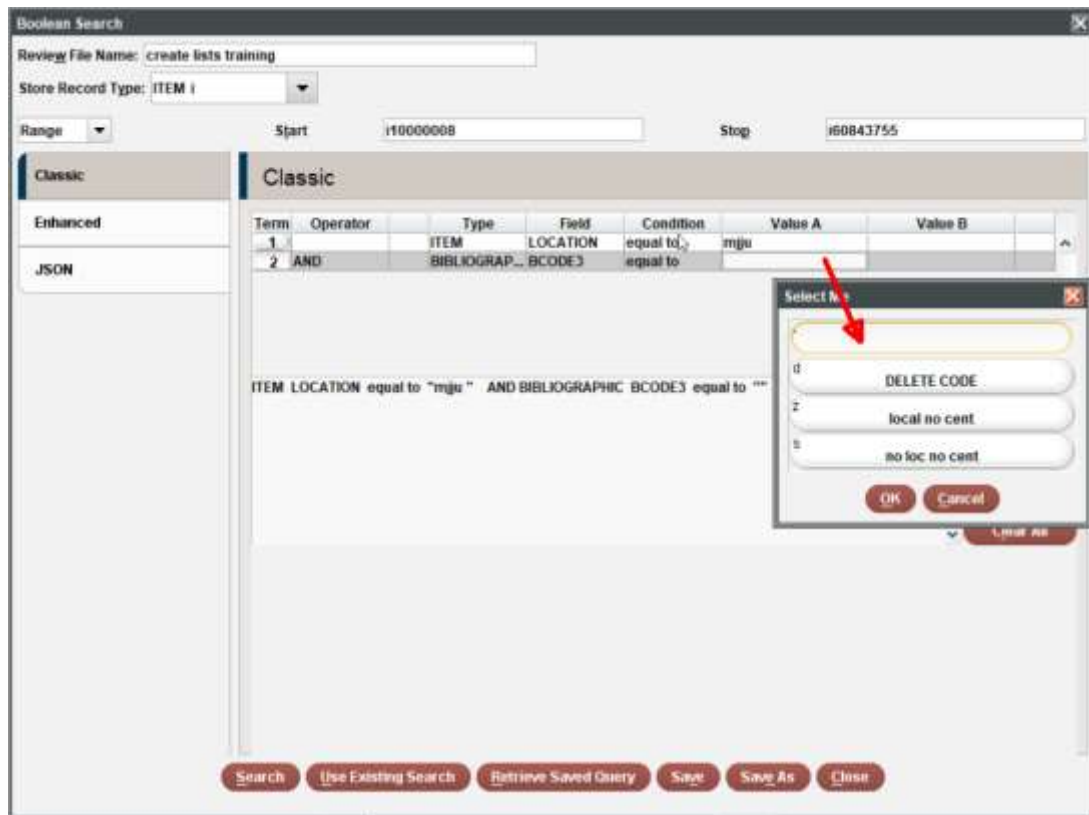


2) Click on BCODE3, and OK



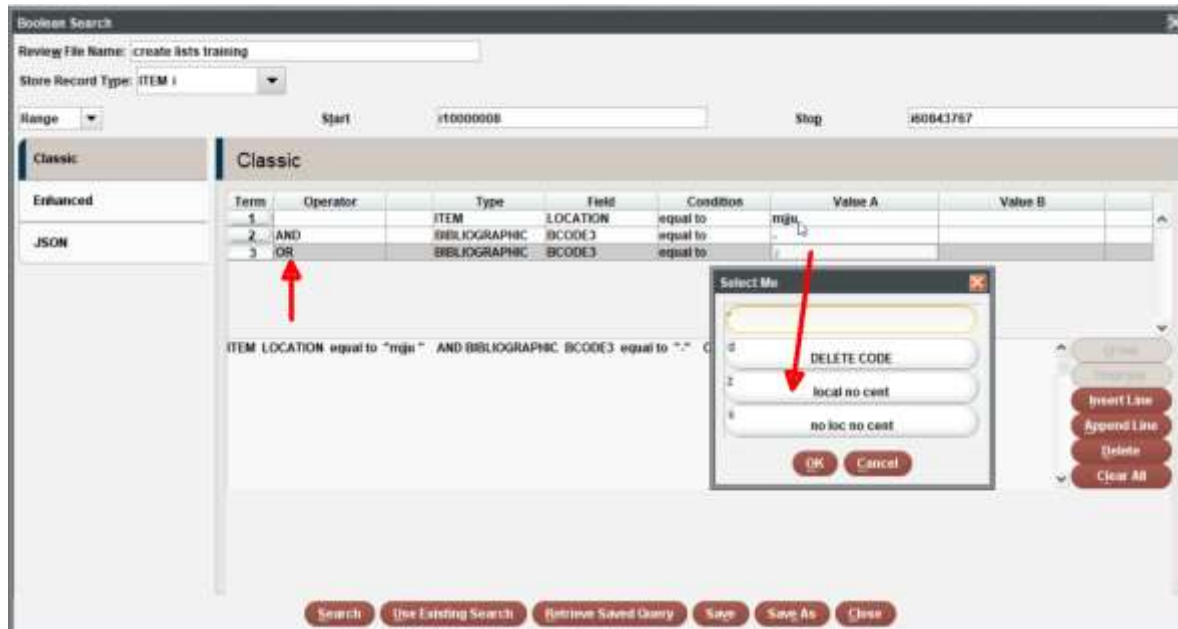
3) Choose = to and then bcode3= -





4) Append another line and add bcode3 = z local no cent

On the Operator Field make sure to pick OR



5) Final Search for all CRC juvenile literature looks like below. See next section to Group

Boolean Search

Review File Name:

Store Record Type: BIBLIOGRAPHIC b

Range  Start  Stop

Classic

Enhanced

JSON

Classic

Term	Operator	Type	Field	Condition	Value A	Value B
1		ITEM	LOCATION	equal to	mju	
2	AND	BIBLIOGRAPHIC	BCODE3	equal to	-	
3	OR	BIBLIOGRAPHIC	BCODE3	equal to	z	

ITEM LOCATION equal to "mju " AND (BIBLIOGRAPHIC BCODE3 equal to "-" OR BIBLIOGRAPHIC BCODE3 equal to "z")

to top

Up Arrow

Insert Line

Expand Line

Down

Close All

## Grouping and Ungrouping Search Terms

If you have three or more search terms, you may group adjacent terms with the same operator into hierarchies.

Select the rows to group by highlighting multiple rows with your cursor. You must select at least two rows to create a group. Terms that belong to a group must be adjacent. (The more complicated the search strategy the better to use groups.)

The screenshot shows the Boolean Search interface with the following details:

- Review File Name: Create Lists Training
- Store Record Type: BIBLIOGRAPHIC b
- Start: b1000008
- Stop: b48188018
- Classic search mode selected.
- Table with 8 columns: Term, Operator, Type, Field, Condition, Value A, Value B.
- Table content:
 

Term	Operator	Type	Field	Condition	Value A	Value B
1		ITEM	LOCATION	equal to	mju	
2	AND	BIBLIOGRAPHIC	BCODE3	equal to	-	
3	OR	BIBLIOGRAPHIC	BCODE3	equal to	z	
- Generated query: ITEM LOCATION equal to "mju" AND BIBLIOGRAPHIC BCODE3 equal to "-" OR BIBLIOGRAPHIC BCODE3 equal to "z"
- Buttons: Search, Use Existing Search, Retrieve Saved Query, Save, Save As, Close.
- Grouping buttons: Group (circled in blue), Ungroup, Insert Line, Append Line, Delete, Clear All.

Choose the **Group** button. Sierra places parentheses around the search terms.

Term	Operator	Type	Field	Condition	Value A	Value B
1		ITEM	LOCATION	equal to	mju	
2	AND	BIBLIOGRAPHIC	BCODE3	equal to	-	
3	OR	BIBLIOGRAPHIC	BCODE3	equal to	z	

Choose the **Ungroup** button to undo a grouping. Sierra removes the parentheses around the search terms.

Click on Search to run the search. Mjuu has 30,144 items when we ran the search.

141	spring 2018	5872	15000	p	complete	strangm	05-14-2018 08:19AM
144	Create Lists Training	30144	400000	b	complete	strangm	10-16-2018 01:56PM

## Deleting Search Terms

To remove a search term that you have already entered:

1. Select the row or rows of the term(s) you want to remove.
2. Choose the **Delete** button to remove the selected row(s), or choose the **Clear All** button to remove all search terms for the current search (you do not need to select the rows when clearing all).

## Modify and re-run an existing search

1. Highlight a previous run search and hit the Search Records button

File	Name	Current Records	Max Records	Type	Status	Login	Created [date/time]
161	mju	31609	50000	i	complete	strangm	12-15-2020 10:22AM
148	mj	16	2500	b	complete	strangm	11-25-2020 11:54AM

2. Click the Edit existing query button



- 1.
3. You can now edit the search criteria! (New feature in 2020 and it is awesome!)

Start: i10000008 Stop: i77214225

Classic

Te...	Operator	Type	Field	Condition	Valu...	Value B
1		ITEM	LOCATION	equal to	mju	
2	AND	( BIBLIOGRAPHIC	BCODE3	equal to	-	
3	OR	BIBLIOGRAPHIC	BCODE3	equal to	z	)

4. Next section examines specifying search criteria

## Use Existing Search

This button allows you to use the strategy from searches run in Sierra that are still in the list of review files. The review file must include initials and a created date/time for it to be available for use. If you want to use a search string you, or someone else, previously used for another list, this allows you to do so. Or, you may want to use a search string that is similar to one you previously used. You could choose an existing search and “tweak” it rather than retyping an entire new search string.

1. Follow steps 1 – 5 in [Creating a New Review File](#) section.
2. When you get to the Boolean Search Window, name your file, choose the record type to store, specify the range, review file, index, or advanced syntax to search, then click on the **Use Existing Search** button.

Boolean Search

Review File Name: OAKC DVDs Added 2013, SH 04/04/14

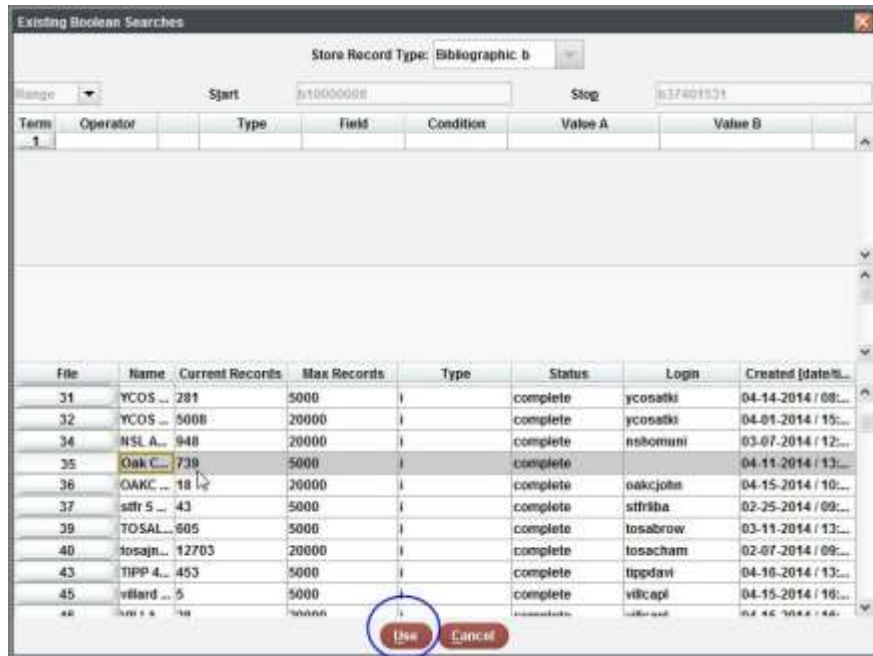
Store Record Type: Item i

Range: Start: i10937428a Stop: i113132037

Term	Operator	Type	Field	Condition	Value A	Value B
1						

Buttons: Search, **Use Existing Search**, Retrieve Saved Query, Save, Save As, Close

3. This will open up the **Existing Boolean Searches** window. Select a line to see the details of the search string in the top half of the window.
  4. Click the **Use** button to incorporate the strategy into your new search.
  5. Add more search terms, or begin your search by choosing Search.
- Here is the final search string for our example:
- 6.



## Retrieve Saved Query

You can incorporate a previously saved search when you specify your search criteria (see [Saving Searches](#) for more information).

1. Follow steps 1 – 5 in [Creating a New Review File](#) section.
2. When you get to the Boolean Search Window, name your file, choose the record type to store, specify the range, review file, index, or advanced syntax to search, then click on the **Retrieve Saved Query** button.

Term	Operator	Type	Field	Condition	Value A	Value B
1		Item	STATUS	has	t	
2	AND	Item	ITEM LOC	has	24	
3	AND	Item	UPDATED	not within	04-02-2014	04-14-2014

Item STATUS has "t" AND Item ITEM LOC has "24" AND Item UPDATED not within "04-02-2014" and "04-14-2014"

3. This will open the **Retrieve Query** window. Select a line to see the details of the search string in the top half of the window.

Term	Operator	Type	Field	Condition	Value A	Value B
1		Item	STATUS	has	t	
2	AND	Item	ITEM LOC	has	83	
3	AND	Item	UPDATED	not within	09-01-2011	09-17-2011

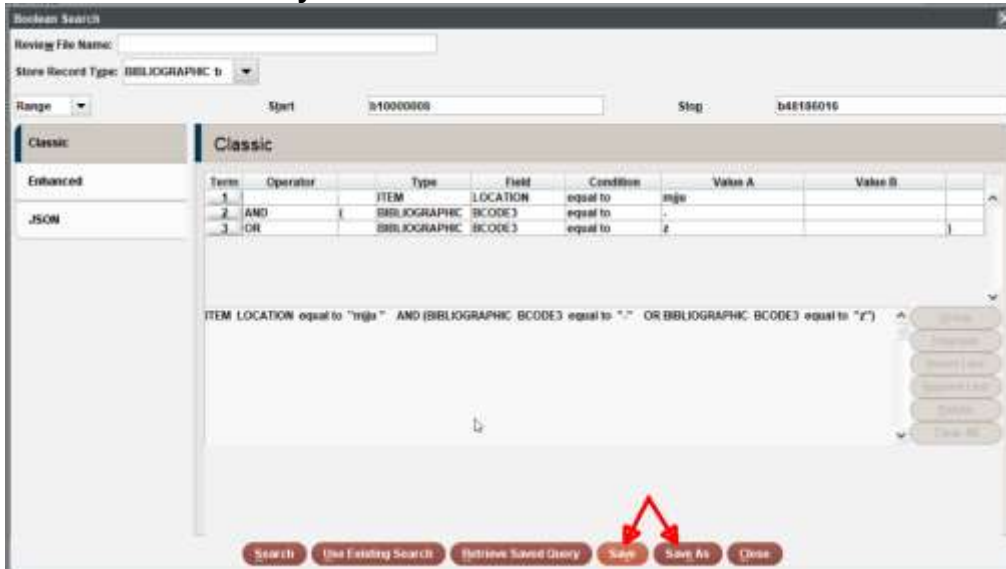
Query	Query Name
82	Credit SUs
83	CSO Search
84	CTRS no circ 5 yr
85	cuda 83 y
86	Cudahy Billed Items
87	CUDAHY IN TRANSIT
88	CUDAHY LOST & PAID
89	Cudahy Missing List
90	Cudahy missing list
91	CUDAHY MONTHLY OVERDUE
92	CUDAHY MONTHLY REG & REREG
93	Databases order records
94	delete code bib files
95	Deleted Serials Code Check
96	DOC ITEM LOC 1T2RTO 1PCPT
97	DVD Ordering
98	DVD types
99	DVD100+

- 4.
5. Click the **Select** button to incorporate the strategy into your new search.
6. Add more search terms, or begin your search by choosing **Search**. Here is the final search string for our example:

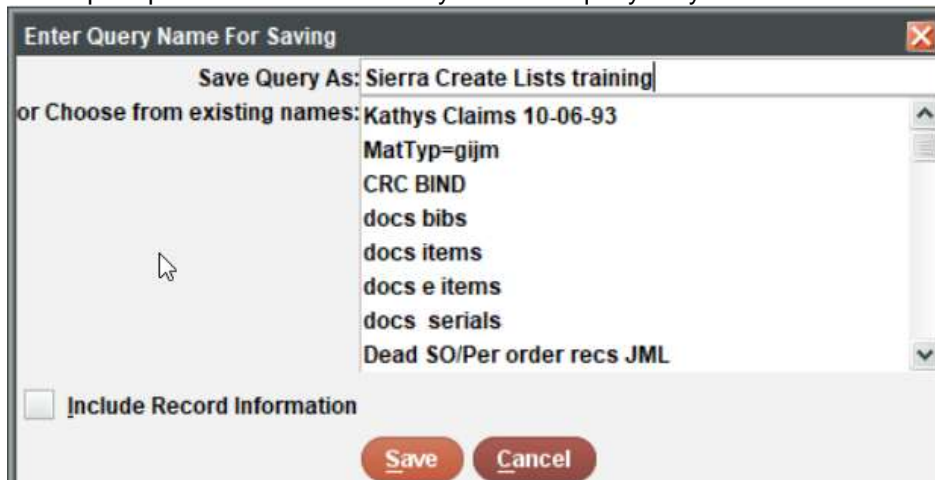
## Saving the Current Search Strategy

You can save your search criteria **before** starting your search. We have a limited number of saved searches, so you should **only** use this option for searches that you run frequently. Be sure to delete your saved searches when you no longer need them. To turn your search criteria for a review file into a saved search:

- Follow steps 1 – 5 in [Creating a New Review File](#) section
- Specify your search criteria.
- Choose the **Save** or **Save As** button (they function exactly the same).
- Include the date and your initials on each SAVED Search!**



- You will be prompted to enter a name for your saved query. Key a new name and choose **Save**.



- Click **Yes** to confirm the save.

## Saving Searches

**Sierra allows you to save up to 100 search strategies** so you should **only** use this option for searches that you run frequently. Be sure to delete your saved searches when you no longer need them. These strategies can be incorporated when you create a review file or add records to an existing review file. After you have saved search strategies, you can review them, modify them, or delete them. To save a search while creating your search strategy, see [Saving the Current Search Strategy](#).

## Controlling Your Search

Begin your search by clicking **Search** at the bottom of the Boolean Search window.

The Boolean Search window will close, and you'll be taken back to the list of files in the **Review Files** tab of the Create Lists mode. The list you're running will be highlighted. The **Status** column will show the words "**in progress**" indicating your list is being generated. Once the list is finished, you will see "**complete**" in the **Status** column.

### Is My Search Pulling the Correct Records?

You can view records gathered so far by selecting the **Show Records** button or double-clicking the list (see [Show Records in a Review File](#) for more information). Note that if you double-click the list while a search is running, you will be warned that "Searching is in progress". Just click **OK** and you will be brought to the list of review files pulled so far.

To look at one of the records while your list is still running, highlight the record and then click **Edit** on the toolbar (see [Editing the Records in a Review File](#) for more information). This is helpful to verify that your list is pulling the correct records without waiting for the entire list to generate especially if it's a big one). To return to the list of records gathered so far, click on **Close** on the toolbar. To return to the list of files in the Review Files tab, click on **Close** from within the list of records gathered so far.

### Stopping Your Search

To stop a search at any time, click the **Cancel** icon on the toolbar. Your search will be cancelled, and the review file will be emptied.





## Searching by a Marc Record Field

For this example I'm going to look for electronic resources with an 956 |u field that has

<https://ezproxy.bgsu.edu/login?>

Look at Bibliographic Record for what you want:

The screenshot shows the Sierra library catalog interface. The main menu includes 'File', 'Edit', 'View', 'Go', 'Tools', 'Reports', 'Admin', and 'Help'. The 'FUNCTION' dropdown is set to 'Catalog'. The search bar contains 't TITLE' and 'css'. The record ID is 'b43689322', last updated '10-16-2018', created '08-10-2017', and has 5 revisions. The record details are as follows:

t	240	1	0	CSS 2 (Online)
t	245	1	0	CSS 2 h[electronic resource] ; bpratique du design web  cRaphaël Goetter ; préface d'Élie Sloim
e	250			3e éd
p	260			[Paris] ; bEyrolles, c2011
r	300			1 online resource
n	500			This ebook is part of a subscription and may become unavailable if publisher contracts change. Only 100 users at a time statewide can access Safari Books Online
n	506			Access restricted to BGSU students, faculty and staff
n	588			Description based on online resource; title from cover (NumiLog, viewed April 22, 2013)
d	650	0		Web sites xDesign
d	650	0		Cascading style sheets
d	650	0		Web site development
j	655	0		Electronic books
b	710	2		Safari Books Online
w	776	0	8	pPrint version: aGoetter, Raphaël.  tCSS 2 : pratique du design web.  b3e éd.  d[Paris] : Eyrolles, 2011  z9782212124613
y	902			c
y	956	4	0	uhttp://ezproxy.bgsu.edu/login?url=https://proquest.safaribooksonline.com/9782212025835 z Connect to resource online from Safari Books Online. Limited to 100 users at a time statewide

Choose review file and enter search terms

Bibliographic Location = nk

And **Bibliographic bcode3** = -

Or Bibliographic bcode3 = z

Choose Field and double click to **Group**

The screenshot shows the Boolean Search interface. The 'Review File Name' field is empty. The 'Store Record Type' is set to 'BIBLIOGRAPHIC b'. The 'Range' is set to 'Start' with value 'b1000008' and 'Stop' with value 'b48197580'. The search query is being built in a table:

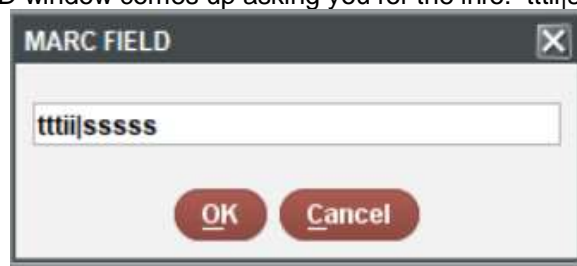
Term	Operator	Type	Field	Condition	Value A	Value B
1		BIBLIOGRAPHIC LOCATION		equal to	nk	
2	AND	BIBLIOGRAPHIC BCODE3		equal to	-	
3	OR	BIBLIOGRAPHIC BCODE3		equal to	z	
4	AND	BIBLIOGRAPHIC				

The resulting search query is: BIBLIOGRAPHIC LOCATION equal to "nk" AND (BIBLIOGRAPHIC BCODE3 equal to "-" OR BIBLIOGRAPHIC BCODE3 equal to "z" AND BIBLIOGRAPHIC ).

a) Scroll to bottom and choose! MARC Tag and then click OK



c) The following MARC FIELD window comes up asking you for the info: tttii|sssss



d) Enter Marc 95640|u record information



e) Enter the has and then the text you want: "ezproxy.bgsu.edu"

Term	Operator	Type	Field	Condition	Value A	Value B
1		i	LOCATION	equal to	nkejo	
2	AND	(	BIBLIOGRAPHIC BCODE3	equal to	-	
3	OR	BIBLIOGRAPHIC BCODE3		equal to	z	)
4	AND	BIBLIOGRAPHIC	MARC Tag 95640 u	has	ezproxy.bgsu.edu	

f) Search will look like:

Start  Stop

### Classic

Term	Operator	Type	Field	Condition	Value A	Value B
1			LOCATION	equal to	nkejo	
2	AND	(	BIBLIOGRAPHIC	BCODE3	equal to	-
3	OR	BIBLIOGRAPHIC	BCODE3	equal to	z	)
4	AND	BIBLIOGRAPHIC	MARC Tag 95640 u	has	ezproxy.bgsu.edu	

ITEM LOCATION equal to "nkejo" AND (BIBLIOGRAPHIC BCODE3 equal to "-" OR BIBLIOGRAPHIC BCODE3 equal to "z") AND BIBLIOGRAPHIC MARC Tag 95640|u has "ezproxy.bgsu.edu"

Group Ungroup Insert Line

g) Run the Search by clicking button

Boolean Search

Review File Name:

Store Record Type:

Range

### Classic

Term	Operator	Type	Field	Condition	Value A	Value B
1		BIBLIOGRAPHIC	LOCATION	equal to	nk	
2	AND	(	BIBLIOGRAPHIC	BCODE3	equal to	-
3	OR	BIBLIOGRAPHIC	BCODE3	equal to	z	)
4	AND	BIBLIOGRAPHIC	MARC Tag 956...	has	https://ezproxy.bgsu.edu/login	

BIBLIOGRAPHIC LOCATION equal to "nk " AND (BIBLIOGRAPHIC BCODE3 equal to "-" OR BIBLIOGRAPHIC BCODE3 equal to "z") AND BIBLIOGRAPHIC MARC Tag 956 |u has "https://ezproxy.bgsu.edu/login"

Group Ungroup Insert Line Append Line Delete Clear All

Search Use Existing Search Retrieve Saved Query Save Save As Close

h) Search Results: (notice we have a lot more Bib record than the 500 record review file I used. I'll repeat the search if the Max Records is equal to the Current Records. If I don't I may be missing records I wanted to catch!

### Review Files

All

File	Name	Current Records	Max Records	Type	Status	Login A	Created [date/time]
52	956 ezproxy	500	500	b	complete	strangm	10-17-2018 02:57PM

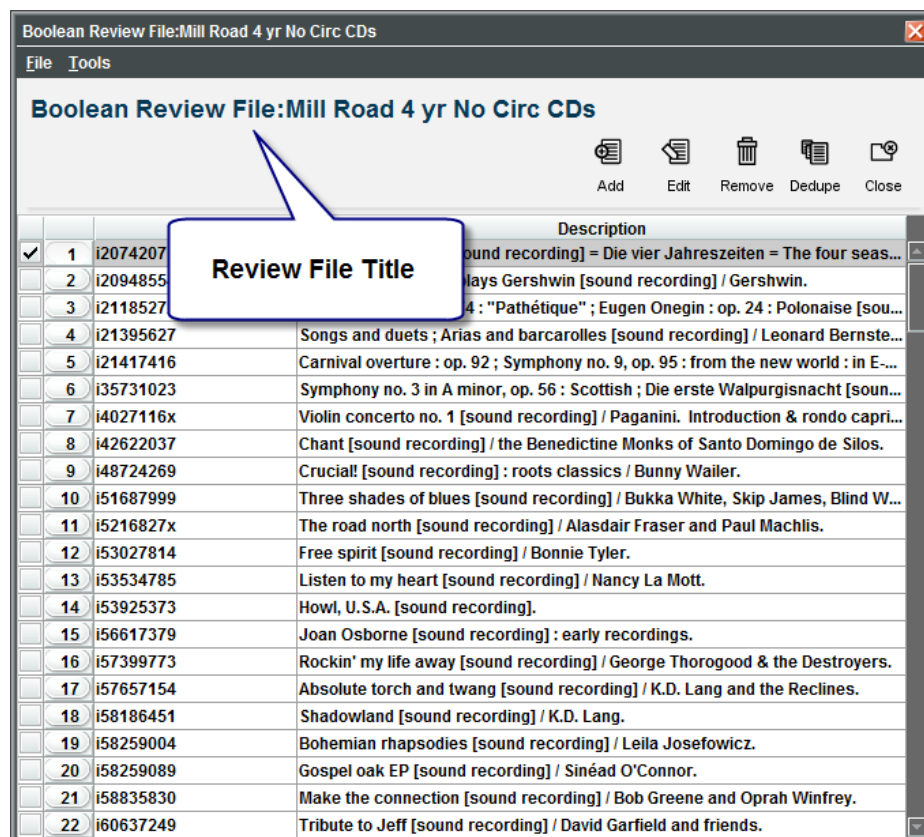
## Show Records in a Review File

This action displays the records in your review file.

1. Highlight the review file you want to review by selecting its row; then choose the **Show Records** button from the **Review Files** tab or Double-click on the row of the review file whose records you want to view.



- 2.
3. The system displays the **Boolean Review File** window, which displays a list of the records by record number and title or patron name. The title of your review file is shown as well as a **toolbar**. These records are sorted by Record Number by default. This can be changed (see [Sorting Records in a Review File](#) for more information).

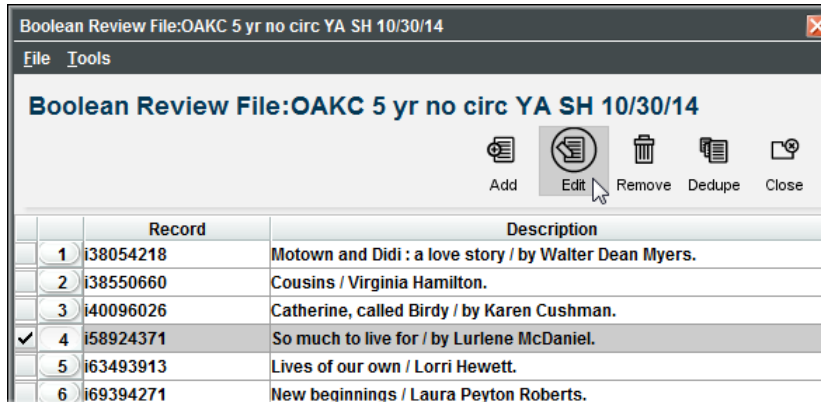


4. From this window, you can do many things. You can view or edit the records. You may also add and remove records from the list. Basically, anything you have authorization to do within a record, you can do from this window. Maybe you want to add e-mail addresses to patron records with no e-mail. Working from your list in Create Lists is more efficient than going into one record at a time from Circulation Desk mode.

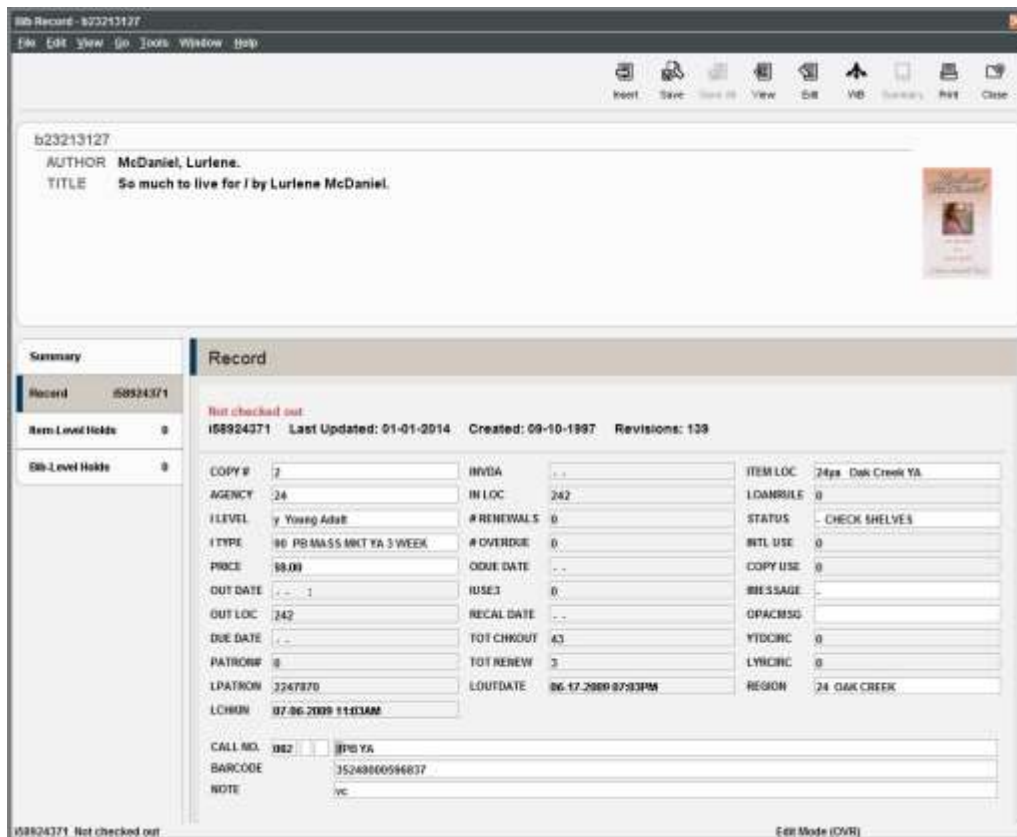
## Editing the Records in a Review File

From your list of records, you can edit (or just view) records.

1. To edit (or just view) a particular record, select its row.
2. Choose the **Edit** icon from the toolbar.  
(Alternatively, you could just double-click the row you wish to edit (or view).)



3. The system displays an editing window in which you can edit (or just view) the record.



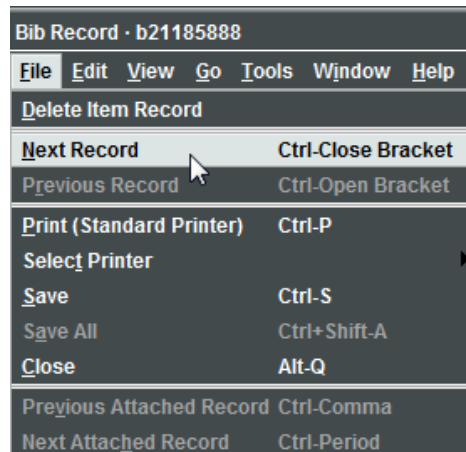
Here you can do any editing function, add an e-mail address, change a phone number, correct the data in a fixed-length field, etc.

**Important Note: Your ability to edit or make changes to any record in the system is dependent upon the type of authorizations you have in the Innovative software.**

## Advance to next record: Create List keyboard shortcut

If you want to see the next record in your list without returning to the list, click File on the menu bar and choose Next Record from the drop-down list or use the CTRL + ] keyboard shortcut.

Or, to see the previous record in your list, click **File | Previous Record** or use the **CTRL + [** keyboard shortcut. This is an efficient way to move through your list.



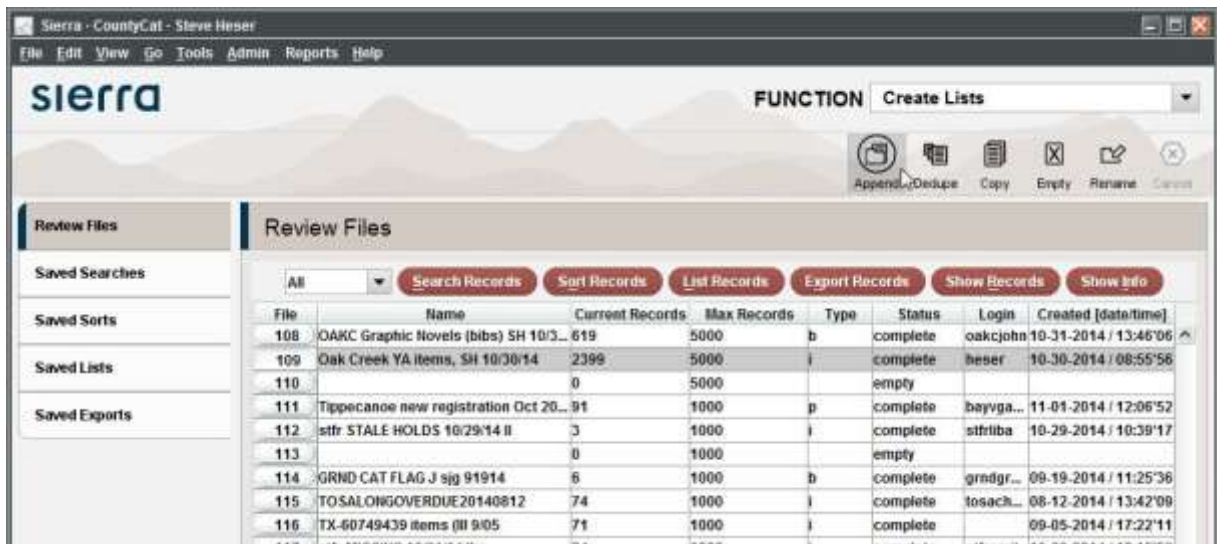
4.

When you are finished with the record, click **Close** on the toolbar to return to your list.

## Appending Records to a Review File

You can append more records to a completed list. This does not overwrite your list; it adds records to it.

1. Choose the review file to which you want to add records by selecting its row.
2. Choose the Append icon from the toolbar.

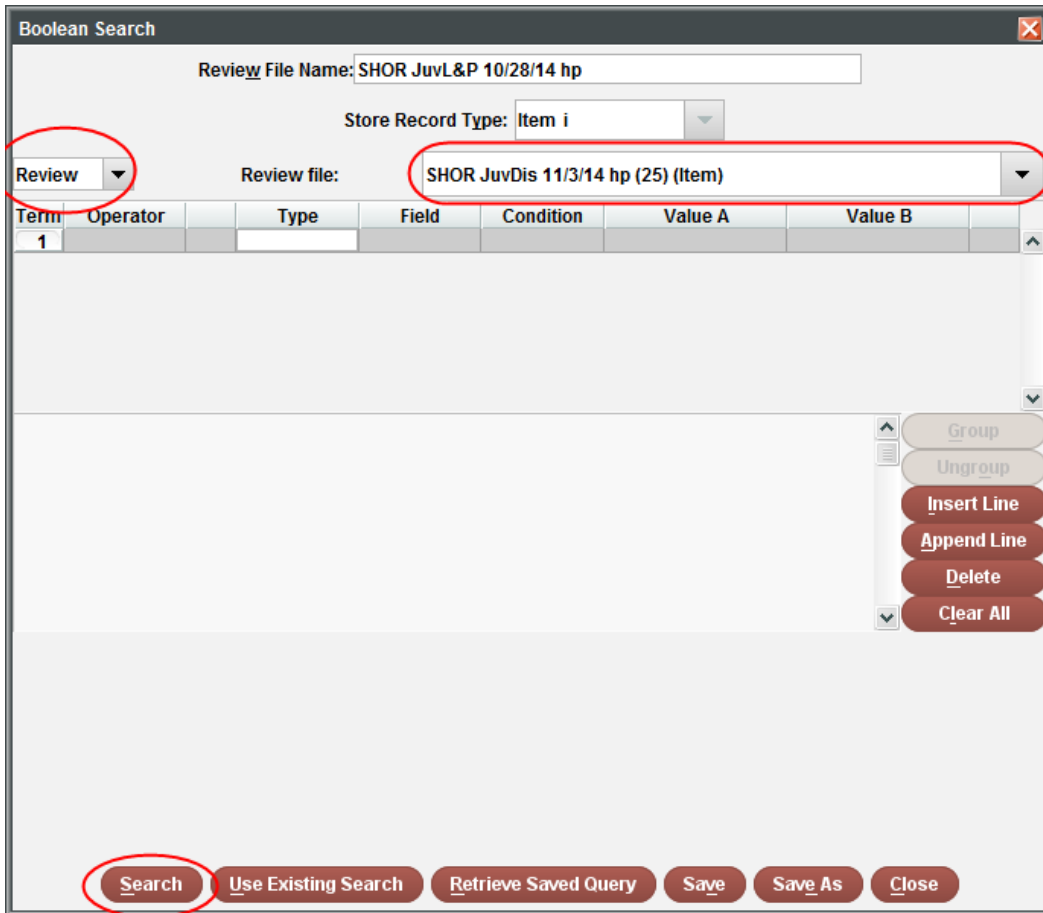


3. Sierra displays the Boolean Search window.
4. You can change the name for the review file by entering a new name.
5. Enter your search criteria (see Specifying Search Criteria for more information).
6. Choose Search to begin searching.
7. The new records will appear in your list.
8. You can also append records by using the item barcode with a barcode scanner!

## Merging Review Files

If you want to merge two review files together, you have the option to do so by using the **Append** tool.

1. Choose one of the two review files that you want to merge by selecting its row.
2. Choose the **Append** icon from the toolbar. Sierra displays the Boolean Search window.
3. Choose **Review** from the Range drop-down list and select the review file you want to merge into the current review file.



4. Click **Search**. The two files have now been merged. The additional records are appended to the end of the first review file. The second review file remains intact. You may choose to delete the second review file if you no longer need it.
5. If necessary, remove duplicate records from your merged file by highlighting the merged review file and then clicking on the **Dedupe** icon on the toolbar.

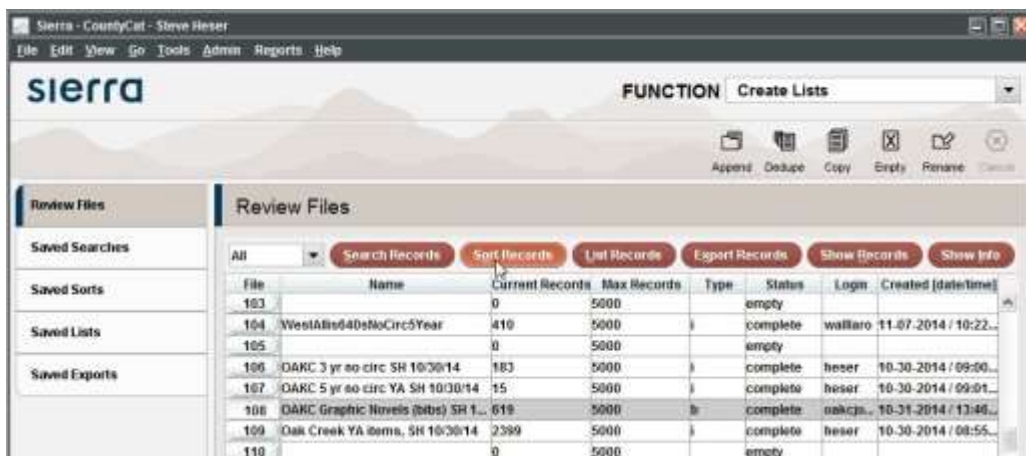


## Sorting Records in a Review File

You can sort the records in a review file. This makes it easier to work with your list. You can specify one or more fields that you want to use for the sort, and they can be from the fields of the type of record that are in your file or fields from attached records (see [Appendix A. The Law of One Hop](#) for more information).

To sort a review file:

1. Choose the review file you want to sort by selecting its row.
2. Choose the **Sort Records** button located at the top of the **Review Files** tab.



3. Double-click in the **Type** cell and choose a record type from the pop-up window (see [Enter the Type of Record to Search](#) for more information).
4. Double-click in the **Field** cell and choose a field from the pop-up window (see [Enter the Field](#) for more information).
5. (Optional) Specify additional sort criteria by choosing **Append** or **Insert** (see [Specifying Additional Sort Criteria](#) for more information).
6. (Optional) Delete sort criteria by choosing **Delete** (see [Deleting Sort Criteria](#) for more information).
7. When you have chosen the sort criteria, choose the **Sort/Save** button. Sierra will begin sorting the records in the review file, and the sort will be saved as part of the review file's attributes.

While the review file is being sorted, the status in the **Status** column of the **Review Files** tab will say "sorting," and the buttons located at the top of the Review Files tab will be disabled for the selected review file. When the sort has been completed, the status in the **Status** column will say "complete" and the buttons will be enabled again.

### Specifying Additional Sort Criteria

To specify additional sort criteria:

1. Specify your criteria for the first sort.
2. Choose the **Append** button to add a sort criterion after the last criterion in the table, or choose the **Insert** button to add a sort criterion before the selected criterion.
3. Double-click in the **Type** cell and choose a record type from the pop-up window.
4. Double-click in the **Field** cell and choose a field from the pop-up window.



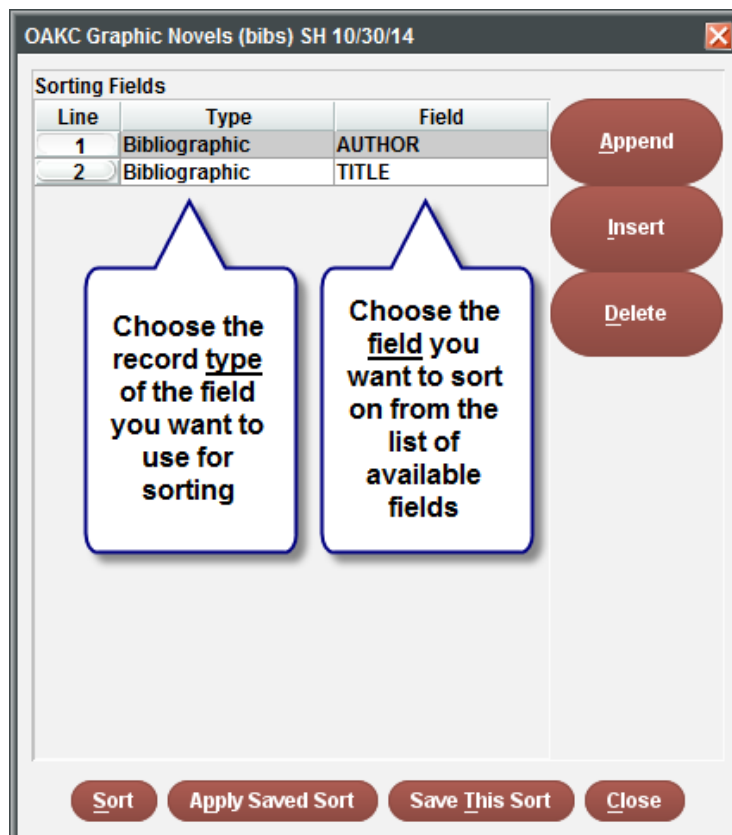
5. Repeat steps 2 through 4 until you have specified all of the desired sort criteria.
6. Choose the **Sort/Save** button. Sierra will begin sorting the records in the review file, and the sort will be saved as part of the review file's attributes.
7. An unlimited number of sort criteria may be created. The records in the review file will be sorted in the order that the sort criteria are listed in the table. Think of this as primary, secondary, etc. sorts that are used in other programs like Microsoft Word© and Excel©.

### **Deleting Sort Criteria**

To remove a sort criterion from the table:

1. Select the row or rows of the sort(s) you want to remove.
2. Choose the **Delete** button to remove the selected row(s).

Here's an example of a **Sorting Fields** dialog box. In this example, a sort is being applied to a list of graphic novels owned by Oak Creek. The primary sort is by the AUTHOR code and the secondary sort is on the bibliographic TITLE of the item. The output will show a sorted list of graphic novels in alphabetical order by author first and then by title second.



## Using the Information in Your List Outside of Sierra

Once you have created and sorted your list, you can work with the list within Sierra using **Show Records**, or you can take the information from your list outside of Sierra. You are limited in **Show Records** to only seeing the record number and description. It is necessary to look at individual records to see the data you are really looking for. This means looking at records one at a time, which is quite time consuming. A more efficient method is to choose what data you need in Sierra and take it with you. Two options are available for moving data outside of Sierra:

- Listing the Records
- Exporting the Records

### Listing the Records in a Review File

You can list selected fields from the records in a review file and send them to your local printer or e-mail them to yourself. For example, for a booklist, you probably want to list the call number from the item, and the author and title from the bib record. For a list of patrons with overdues, you might want to list their names and phone numbers from the patron record, and the item call numbers and dates checked out from the item record.

In the following example, a review file was created that lists all of the Pop Culture Library DVD's. Here is the search string that was used to create the list. Note that the bottom of the **Show Info** window indicates a sort was also applied.

Boolean Search

Review File Name: Create Lists Training

Store Record Type: ITEM

Range: Start: 10000008 Stop: 16084436x

Term	Operator	Type	Field	Condition	Value A	Value B
1	(	b	BICODE3	equal to	-	
2	OR	BIBLIOGRAPHIC BCODE3		equal to	z	)
3	AND	ITEM	LOCATION	equal to	mpav	

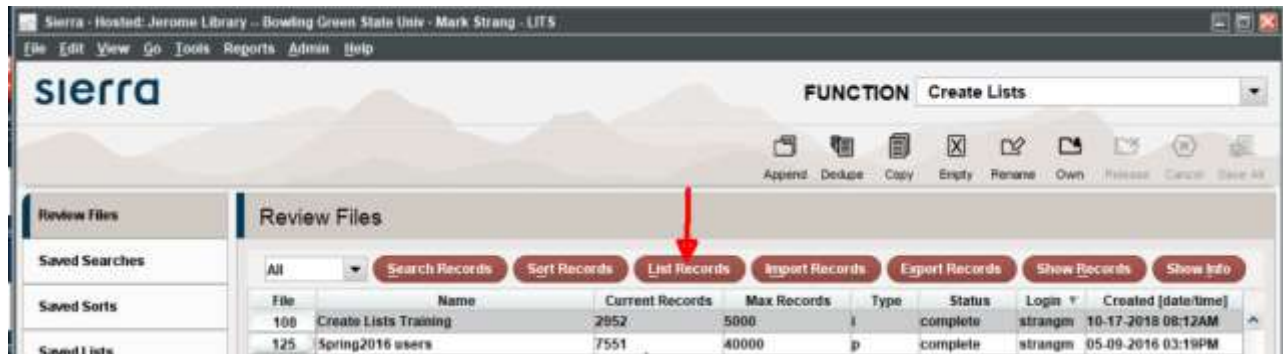
(BIBLIOGRAPHIC BCODE3 equal to "-" OR BIBLIOGRAPHIC BCODE3 equal to "z") AND ITEM LOCATION equal to "mpav"

Buttons: Insert Line, Append Line, Delete, Clear All

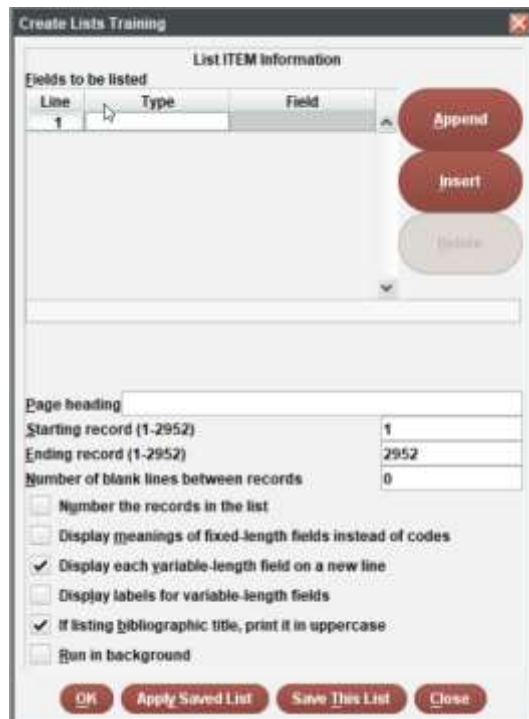
Buttons: Search, Use Existing Search, Retrieve Saved Query, Save, Save As, Close

To list and print selected fields from the records in a review file:

1. Select the row of the review file that contains the data you want to list.
2. Click the **List Records** button located at the top of the **Review Files** tab.



3. The **List Format** dialog box will open.



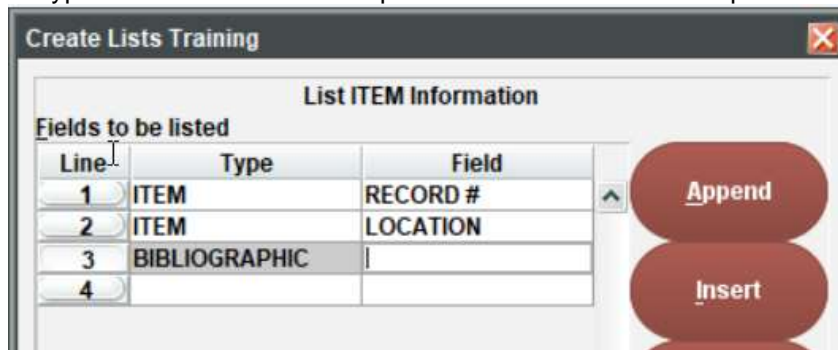
In the top half of the dialog box, use the same processes to add and fill out the fields to be listed as you used in the **Sort Records** dialog box (see [Sorting Records in a Review File](#) for more information). They are shown briefly here:

4. Double-click in the **Type** cell and choose a record type from the pop-up window.
5. Double-click in the **Field** cell and choose a field from the pop-up window.
6. Choose the **Append** button to add another field to be listed, and repeat steps 4 and 5. Alternatively, choose the **Insert** button to add a field before the selected field, and repeat steps 4 and 5.

An unlimited number of fields may be selected. The fields will be listed in the order in which they appear in the Fields to be listed table.

7. (Optional) Remove a field to be listed by selecting its row and choosing the **Delete** button.

8. Here are the Types and Fields we want to print out or e-mail in our example:



Note the MARC Tag 245|a BIBLIOGRAPHIC field was chosen instead of the BIBLIOGRAPHIC TITLE field. The TITLE field gives a long phrase of information whereas the MARC Tag 245|a gives you a truncated title (see [Specifying Data by MARC Tag](#) for more information).

9. In the bottom half of the **List Format** dialog, choose the formatting details of the printed list. You can specify the following information:

#### **Page heading**

Enter the heading or title you want to display on the report.

#### **Starting record**

Enter the record number on which to begin reporting.

#### **Ending record**

Enter the record number on which to finish reporting.

#### **Number of blank lines between records**

Enter the number of blank lines to leave between each record.

#### **Number the records in the list**

Select this check box to insert a number before each record in the printed list.

#### **Display meanings of fixed-length fields instead of codes**

Select this check box to display the meaning of fixed-length fields. If you do not select this check box, codes will be displayed instead.

#### **Display each variable-length field on a new line**

Select this check box to display each variable-length field on a separate line. If you do not select this check box, all variable-length fields will be displayed on one wrapping line.

#### **Display labels for variable-length fields**

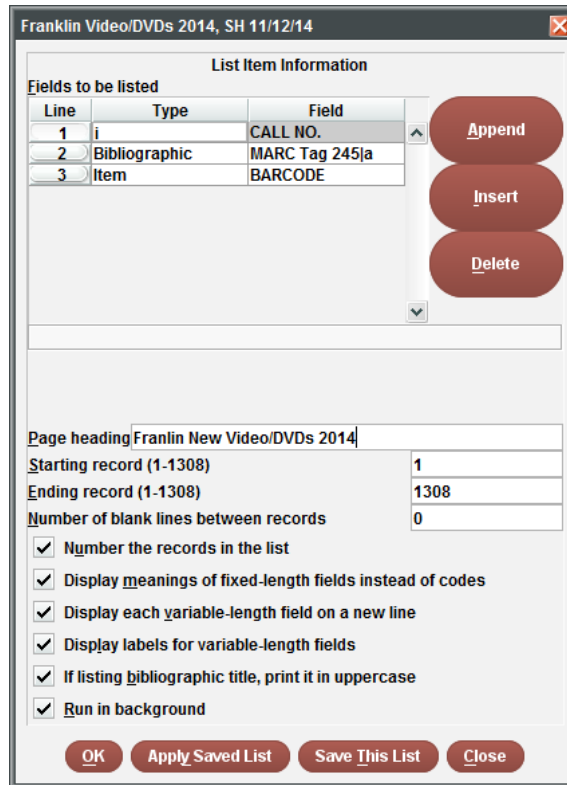
Select this check box to display field labels for all variable-length fields. If you do not select this check box, only the values of the variable-length fields will be listed.

#### **If listing bibliographic title, print it in uppercase**

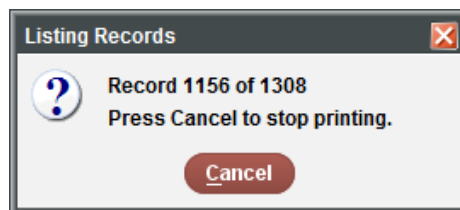
If you choose to list the record title from the bibliographic record, select this check box to have the title display in uppercase letters. If you do not select this check box, the title will be displayed as it appears in the bibliographic record.

#### **Run in background**

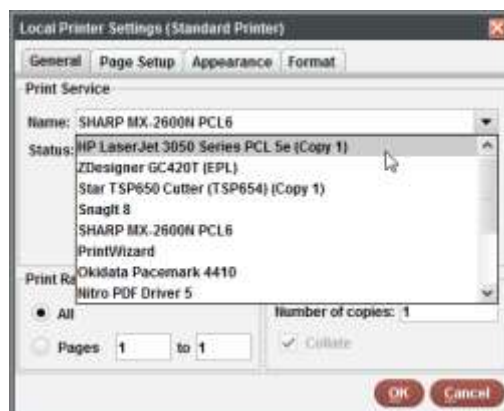
Run the listing process in the background and continue other work in Sierra (good for long lists).



10. Choose the **OK** button to begin creating the list. You are given the option to **Cancel** if you wish.



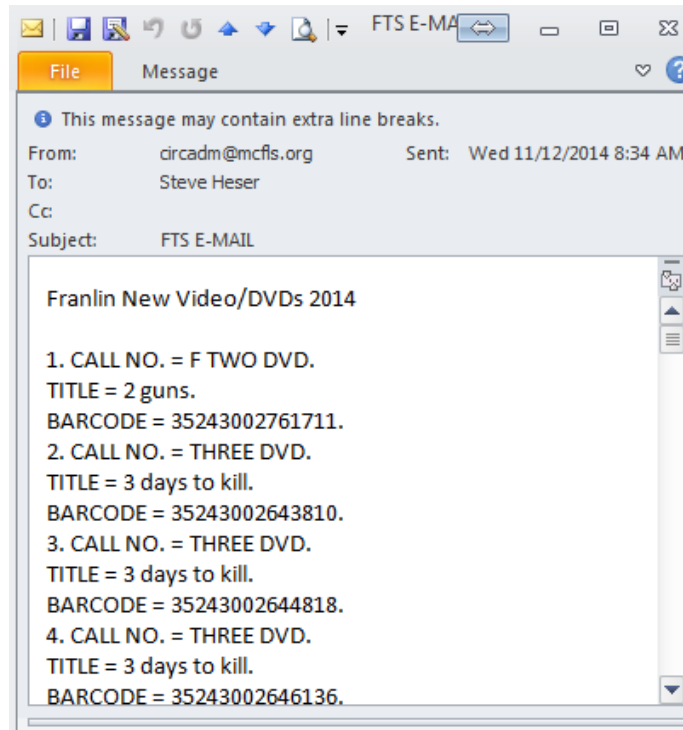
11. If a **Select Printer** dialog appears, select a printer from the list and choose **OK**. This will happen the first time you print a list during your current login session. Each time thereafter, the print jobs will go to the same printer unless you direct them elsewhere.



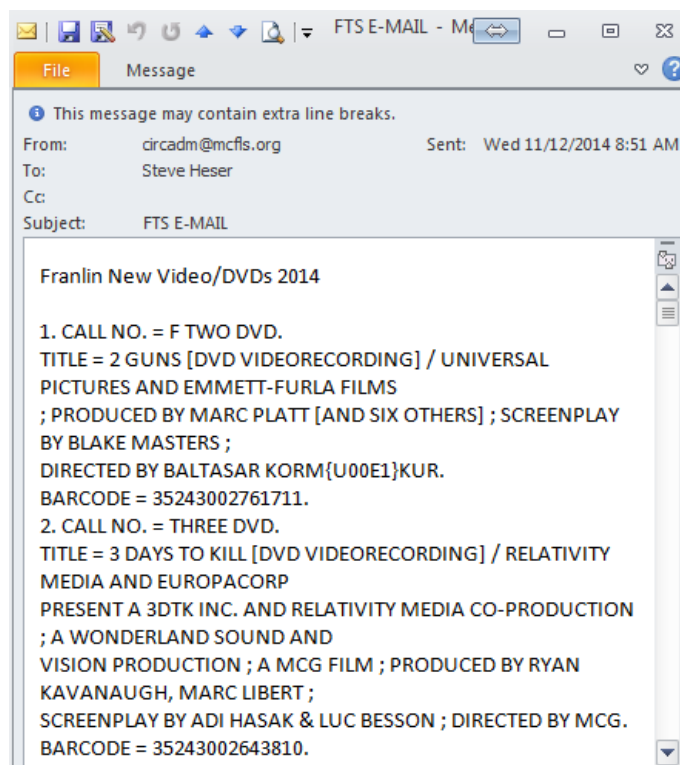
While the review file is being listed, the status in the **Status** column of the **Review Files** tab will say "**listing**," and the buttons located at the top of the Review Files tab will be disabled for the selected review file. When the sort has been completed, the status in the **Status** column will say "**complete**" and the buttons will be enabled again.

12. If you want to email the results to yourself, you need to select the “E-mail Printer” option for the Standard Printer in the Select Printer options. This must be done BEFORE you run your list.

Here is what an e-mail list will look like for the options we’ve chosen.



NOTE: If the BIBLIOGRAPHIC TITLE field had been chosen, rather than the BIBLIOGRAPHIC MARC Tag 245[a], this is what your e-mail would look like. The titles are much longer this way:



## Exporting the Records in a Review File

The Sierra system offers the ability to export selected fields from a review file to a delimited file that is sent to the client PC. This exported file can be imported into many applications, such as Microsoft Excel® and Access®.

In this example we'll use a review file with items from the Pop Culture DVD collection. The goal is to export the information about the items to determine if any of the materials should be weeded.

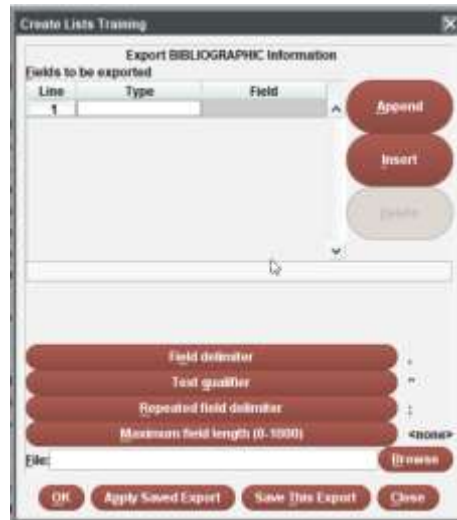


To export selected fields from the records in a review file:

- Select the row of the review file that contains the data you want to list.
- You may want to sort by Item Record Call # for convenience sake before exporting
- Click the **Export Records** button located at the top of the **Review Files** tab.



- a. The **Export Format** dialog box will open



In the top half of the dialog box, use the same processes to add and fill out the fields to be listed as you used in the **Sort Records** and **List Records** dialog boxes (see [Sorting Records in a Review File](#) and [Listing the Records in a Review File](#) for more information). They are shown briefly here:

- b. Double-click in the **Type** cell and choose a record type from the pop-up window.
- c. Double-click in the **Field** cell and choose a field from the pop-up window.
- d. Choose the **Append** button to add another field to be listed, and repeat steps 4 and 5. Alternatively, choose the **Insert** button to add a field before the selected field, and repeat steps 4 and 5.

An unlimited number of fields may be selected. The fields will be listed in the order in which they appear in the Fields to be listed table.

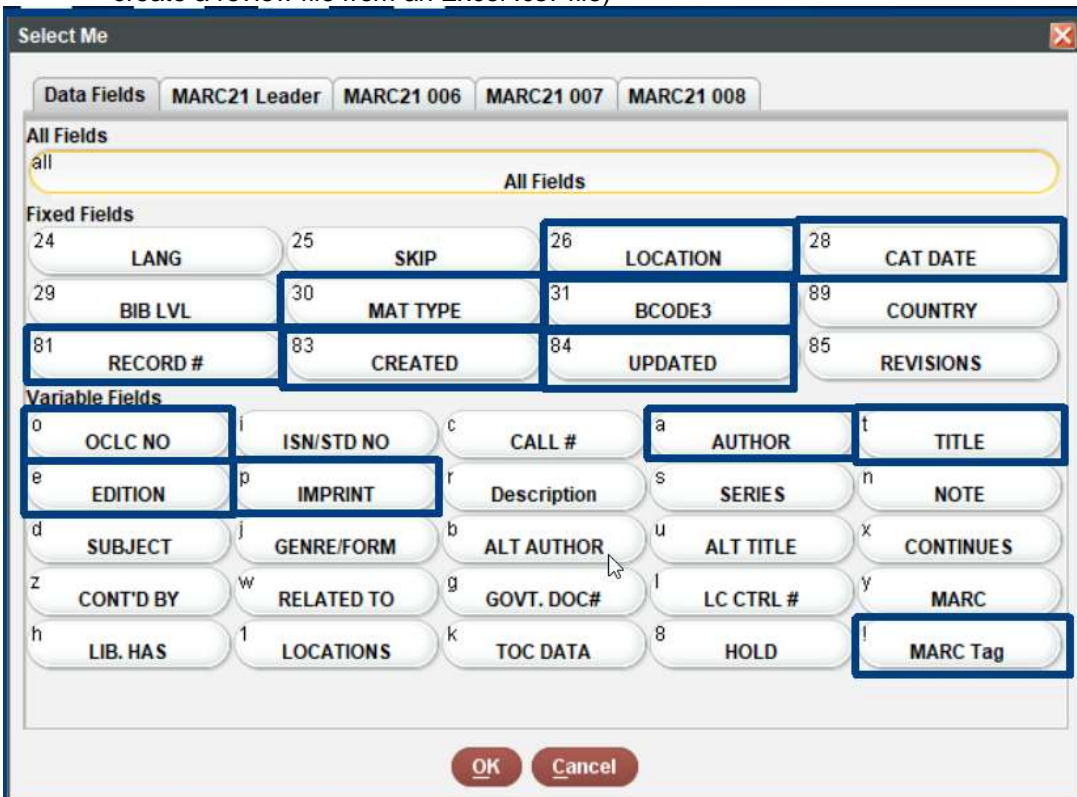
- e. **Always include the item record # or bib record # in the fields you export!**
- f. (Optional) Remove a field to be listed by selecting its row and choosing the **Delete** button.



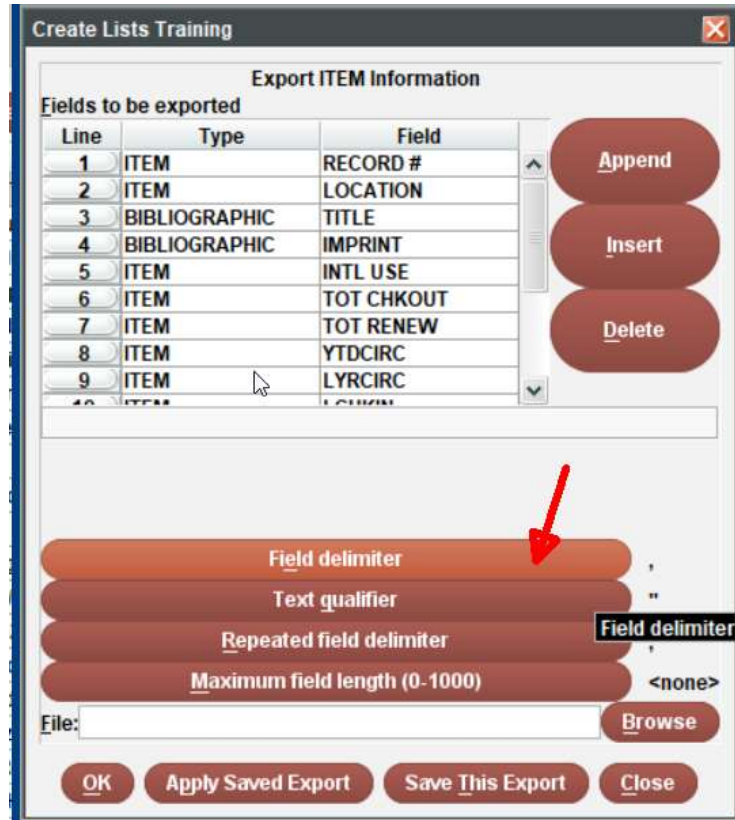
g. Some of the item record fields I find useful in an export:  
**Always include the item record # when you do and export!** (Create List allows you to create a review file from an Excel .csv file)



h. Some of the bib record fields I find useful in an export:  
**Always include the item record # when you do and export! !** (Create List allows you to create a review file from an Excel .csv file)



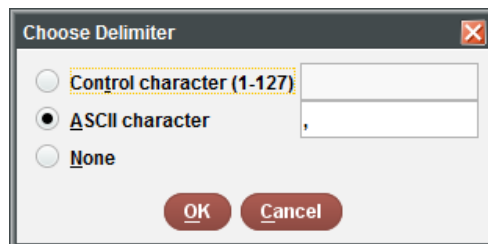
- i. Here are the Types and Fields we want to export in our example:



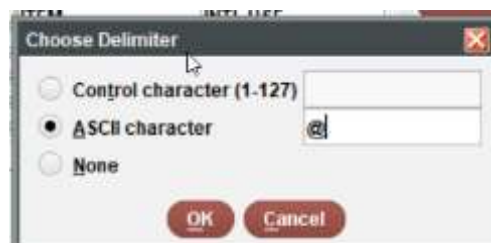
- j. **You could Apply Saved Export: Mark significant fields export 12/23/20**
- k. In the bottom half of the dialog box, choose the formatting details of the exported list. Default options are shown beside the format detail boxes. Most of the time, you will keep all of the defaults. You can specify the following information when necessary:

**Field delimiter**

This is what will separate each field that you export. The default is a comma. To separate values by tabs, set the Control Character to '9'. This can help with data that usually contains commas like bibliographic titles.



Know your collection! I tend to use something I don't think will be in any of the titles that I am exporting: "@"



For example, if you want to separate each field by the TAB character rather than the comma, enter 9 in the

Control character text box (this is the ASCII value for the TAB character).

### Text qualifier

What precedes and follows the text in each field that you export. The default is the quote character “

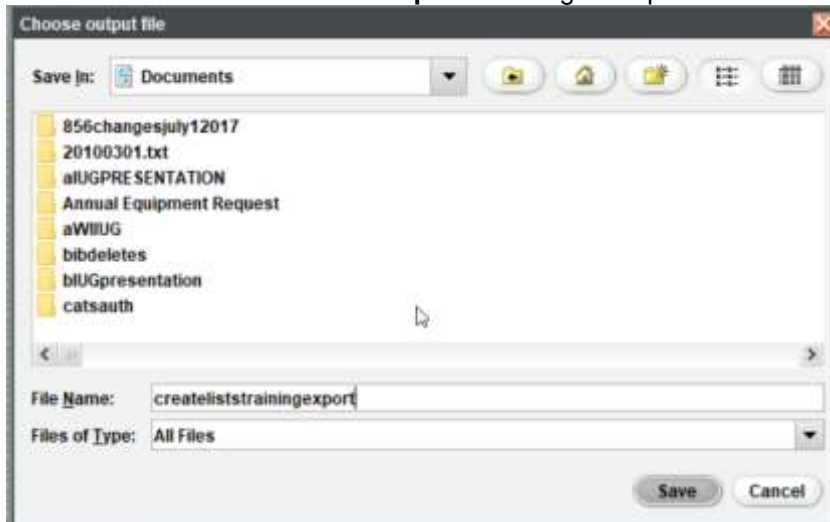
### Repeated field delimiter

What separates repeated fields of the same type. The default is a semicolon ;

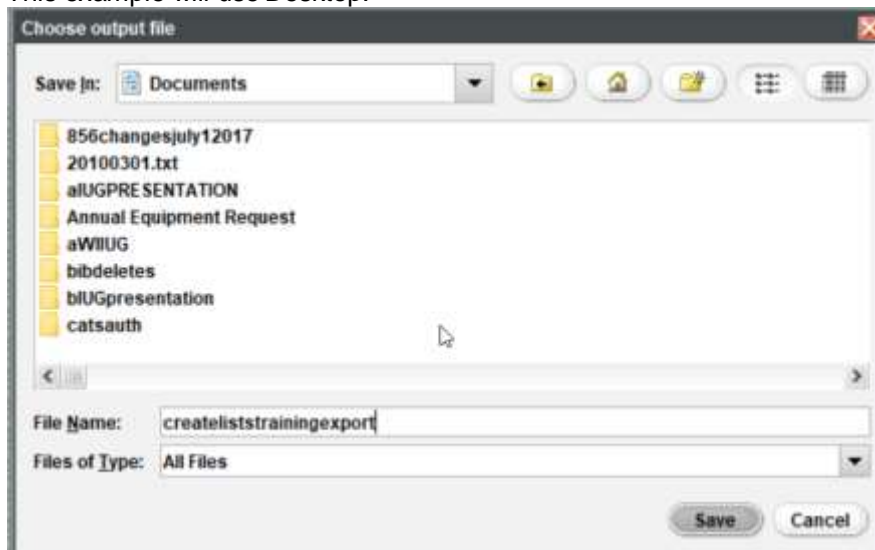
### Maximum field length

Maximum number of characters to export from each field. By default there is no limit. You have the option of changing any of these defaults by clicking on the format detail. A **Choose Delimiter** dialog box opens where you can make your change:

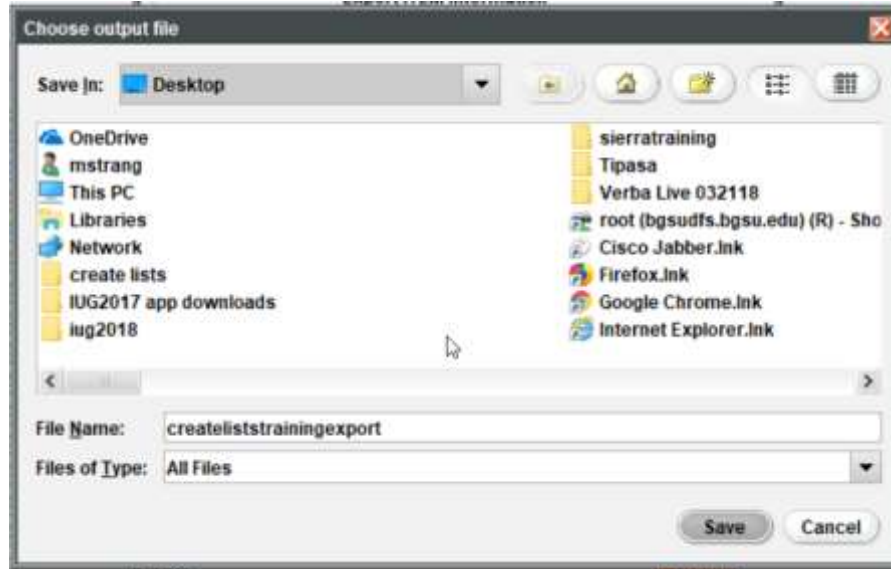
- l. Next you need to input the Output **File** name. This is the name and path to the exported file on the client PC. You may either type a path and filename (e.g., C:\Documents or use the **Browse** button to pop up a file selection dialog box, which allows you to select a directory and enter a filename. The second option is easier.
- m. Click on the **Browse** button. The **Choose output file** dialog box opens.



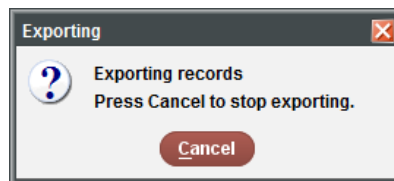
- n. Click the drop-down arrow in the **Save In:** area and select a directory or folder in which to save your file. This example will use Desktop.



- o. Enter a **File Name** and click **Save**. Be sure to leave the **Files of Type** as a Text (.txt) file for easy import into Microsoft Excel© or Access©.



- p. The name is shown in the Export Format dialog box.
- q. Click the **OK** button to export the list. While the review file is being exported, the system presents the following dialog:

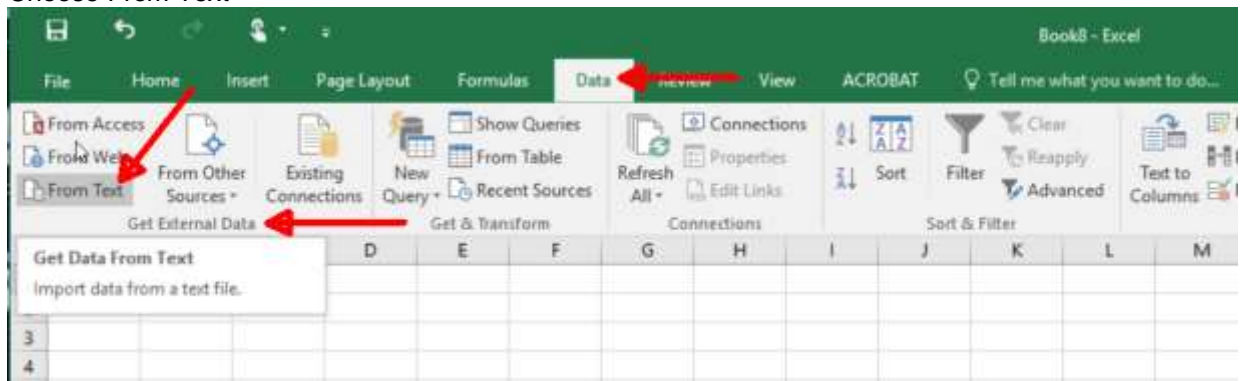


- r. Click **Cancel** if you want to stop the export.

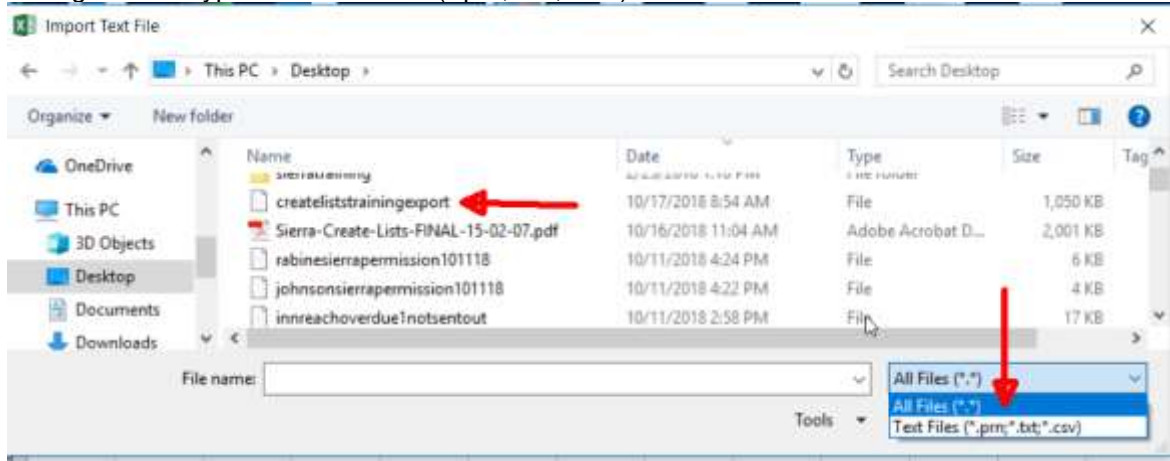
### **Importing Create List export file into Excel**

The Sierra system offers the ability to export selected fields from a review file to a delimited file that is sent to the client PC. This exported file can be imported into many applications, such as Microsoft Excel©.

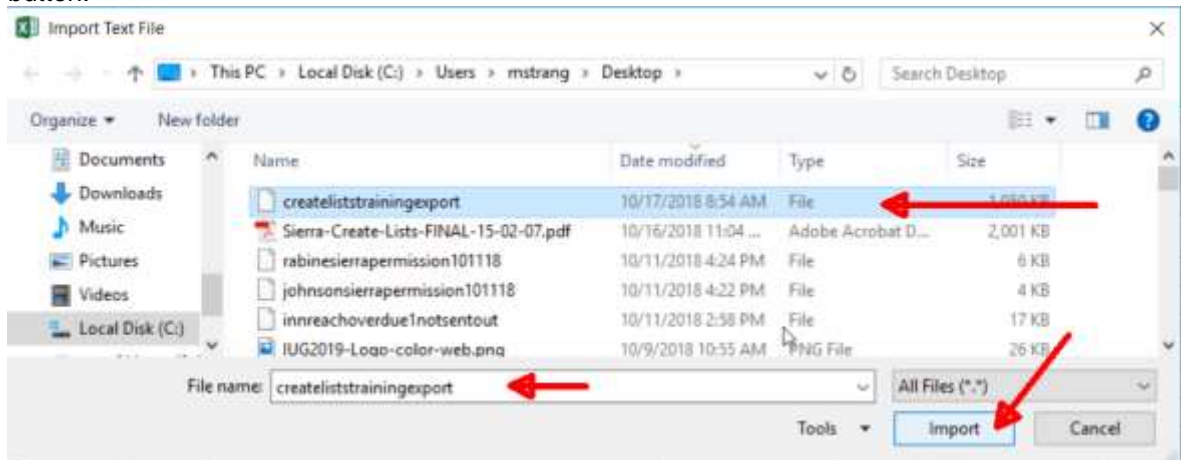
- 1. Open a blank document in Excel. Highlight the Data Tab Under the Get External Data ribbon Choose From Text



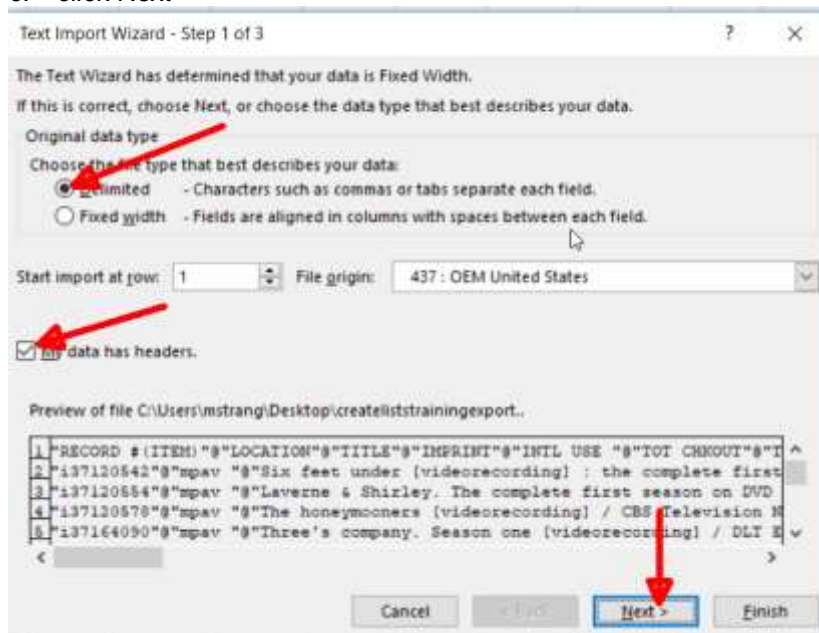
- Navigate to the directory where you saved the export file  
Change the file type from Text Files (\*.prn;\*.txt;\*.csv) to All Files



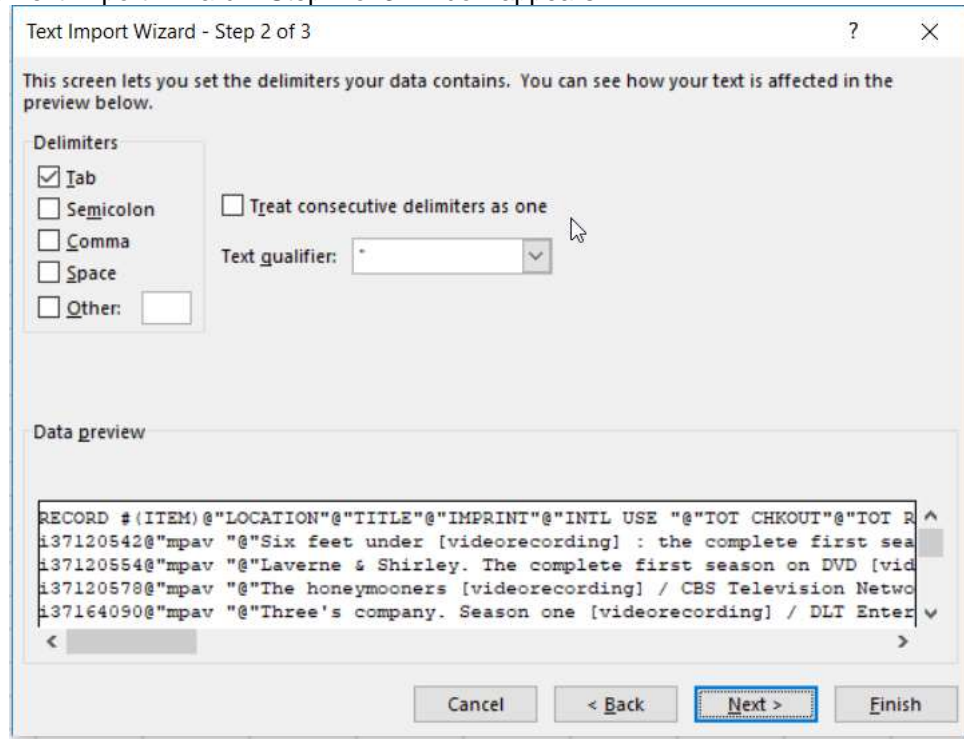
- Highlight and click the file name. It will fill in the File name: window and then hit the Import button:



- When the Text Import Wizard – Step 1 of 3 window appears:
  - Choose Delimited
  - checkmark My data has headers
  - click Next

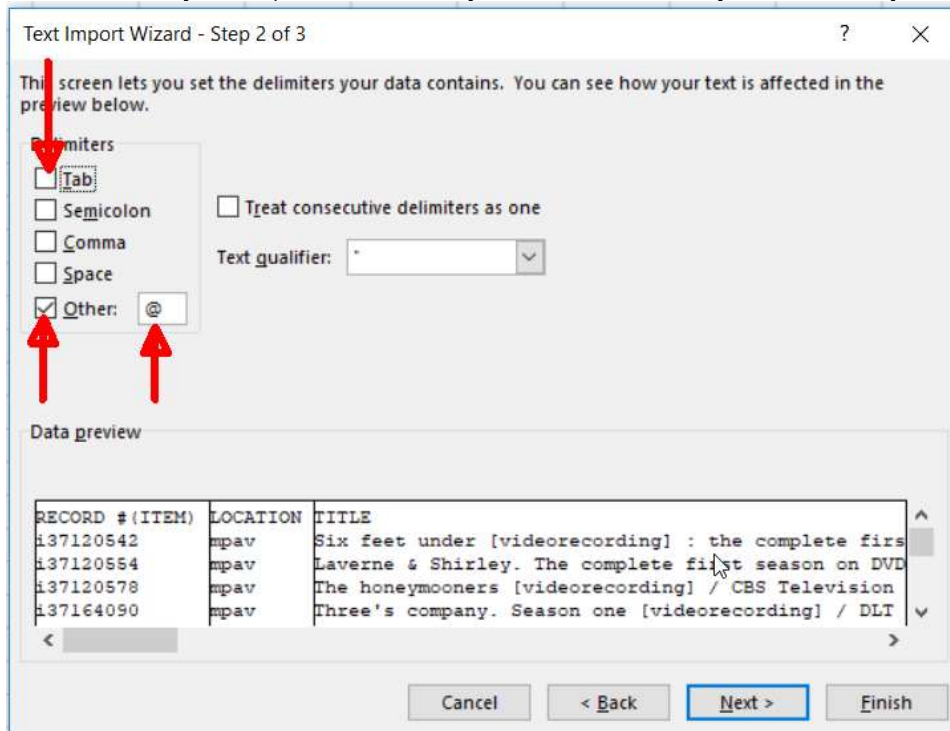


6. The Text Import Wizard – Step 2 of 3 window appears:



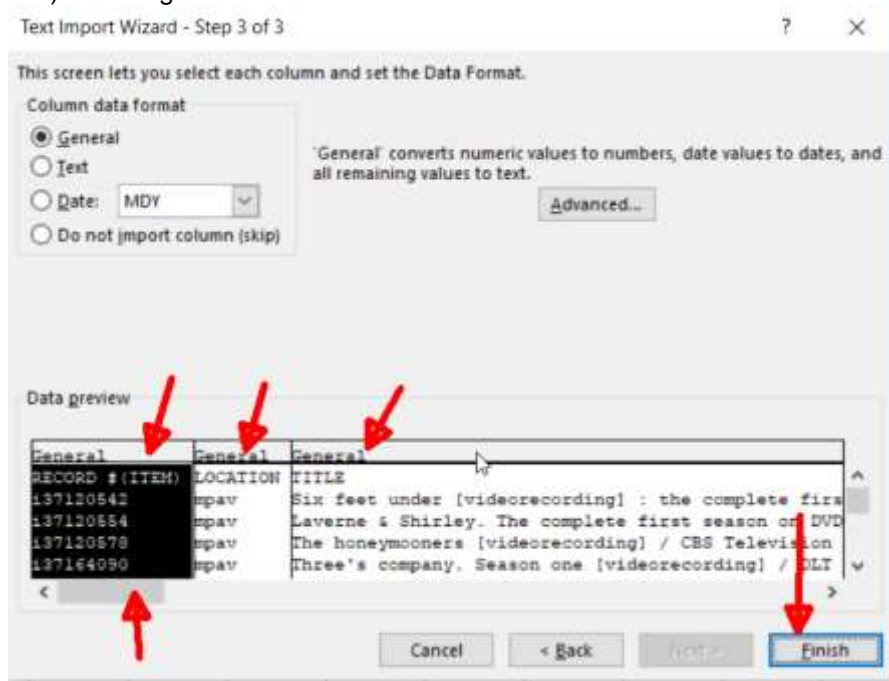
7. Text Import Wizard Setp 2 of 3

- Uncheck the box next to Tab
- Check the next to Other:
- Enter the @ symbol (Make sure the symbol matches what you choose in your export!)



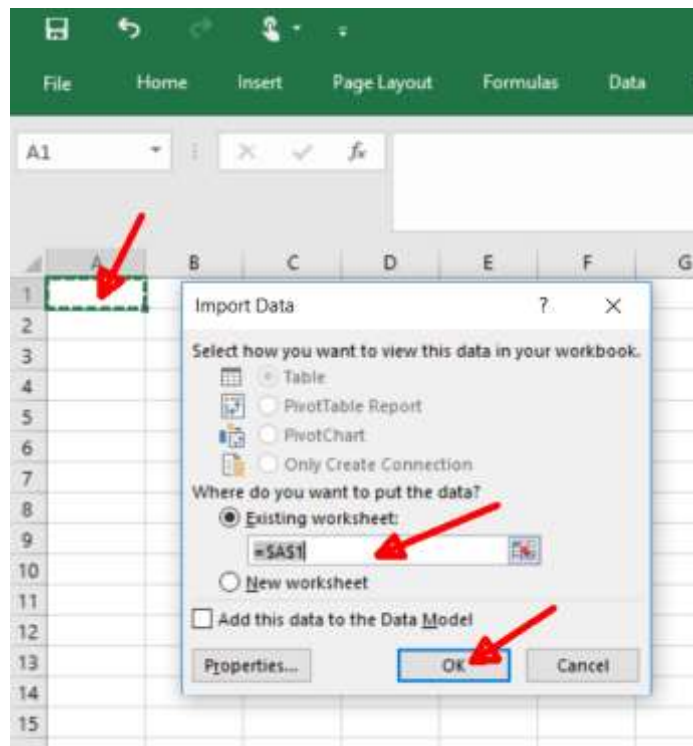
8. Text Import Wizard Step 3 of 3

- a) Check Data in Columns: Record # (ITEM), LOCATION, TITLE, etc. use slider to check other fields
- b) If looks good click Finish



9. Excel Text Import Wizard Step 3 of 3

- a) Make sure Existing worksheet: has =\$A\$1
- b) Click OK button

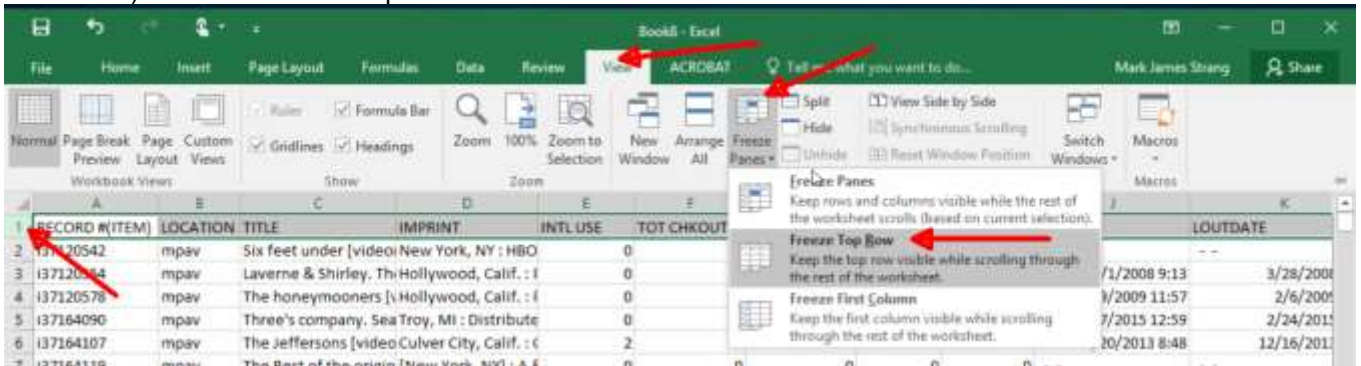


## 10. Data is In Excel

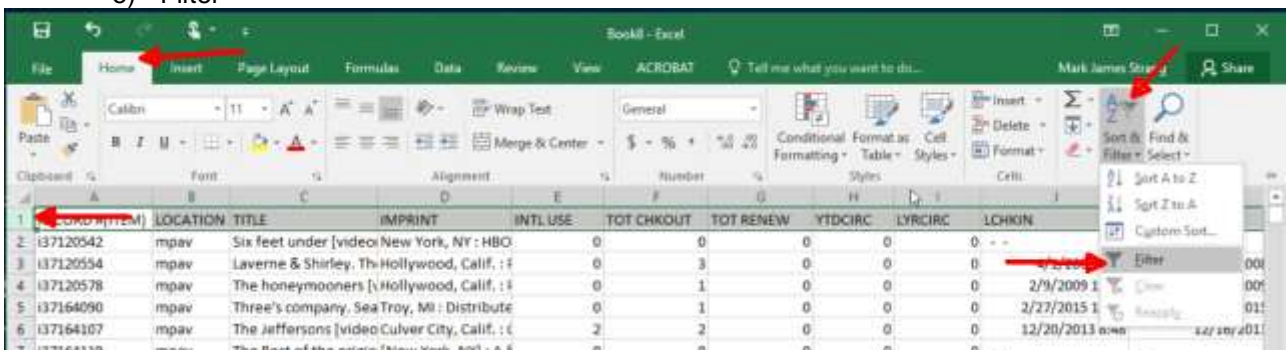
RECORD #(ITEM)	LOCATION	TITLE	IMPRINT	INTL USE	TOT CHKOUT	TOT RENEW	YTD CIRC	LYRCIRC	LCHKIN	LOUDDATE	STATUS	CREATED (ITEM)	CALL #(ITEM)
137120542	mpav	Six feet under [video New York, NY : HBO		0	0	0	0	0	--	--	m	5/16/2005	pop DVD WarnerHomeV
137120554	mpav	Laverne & Shirley, Th Hollywood, Calif. : I		0	3	0	0	0	4/1/2008 9:13	3/28/2008 12:12 c		5/16/2005	pop DVD 0577
137120578	mpav	The honeymooners [v Hollywood, Calif. : I		0	1	0	0	0	2/9/2009 11:57	2/9/2009 16:15 c		5/16/2005	pop DVD 0065
137164090	mpav	Three's company, Sea Troy, MI : Distribute		0	1	0	0	0	2/27/2015 12:59	2/24/2015 17:23 c		6/7/2005	pop DVD 0260
137164107	mpav	The Jeffersons [video Culver City, Calif. : I		2	2	0	0	0	12/20/2013 8:48	12/16/2013 12:14 c		6/7/2005	pop DVD 0280

11. You may want to insert a column before column A and then number it 1 to end of rows. Since you sorted review file by Item Call # before export this allows you to put it back in call number order.  
order

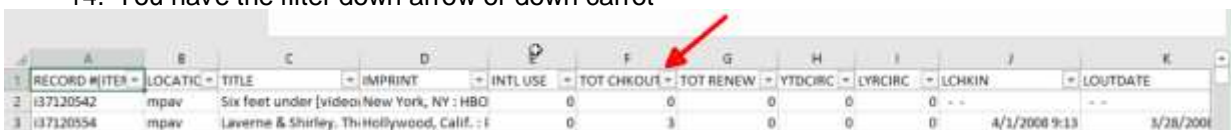
12. Freeze top pain
  - a) Highlight Row 1
  - b) Choose Tab View
  - c) Go to ribbon Freeze panes
  - d) Choose Freeze Top Row



13. Filter Data
  - a) Highlight Tow 1
  - b) Choose Home Ta
  - c) Editing
  - d) Choose AZ Sort & Filter
  - e) Filter



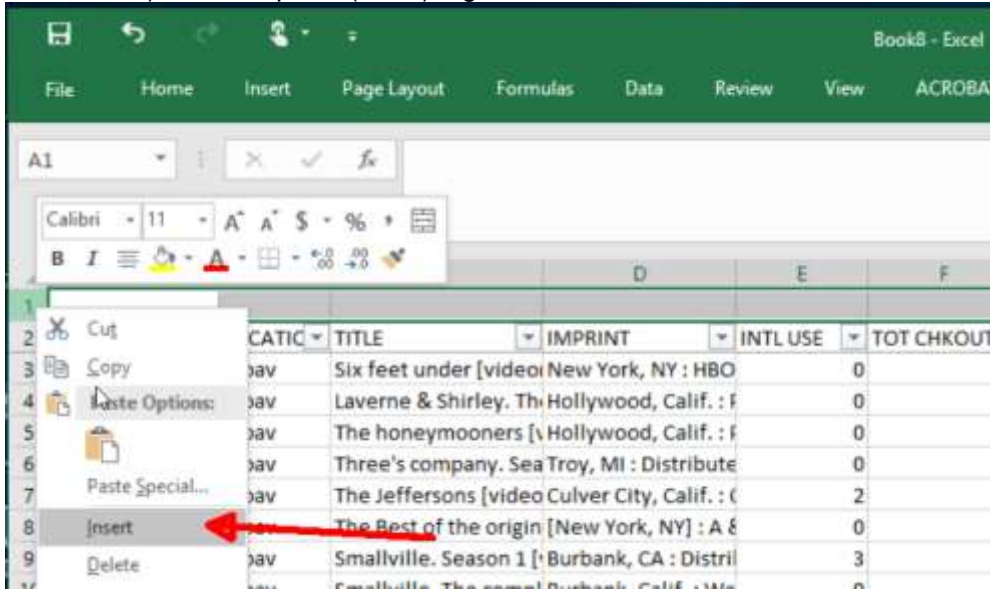
14. You have the filter down arrow or down carrot



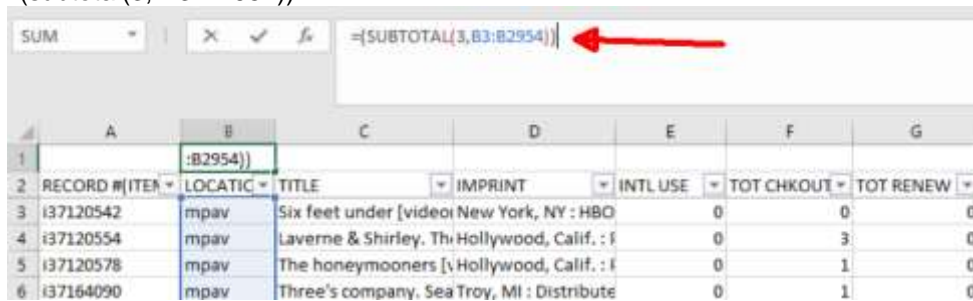


15. Insert new first row

a) Go to top row,(row 1) right click, insert row to create a new row



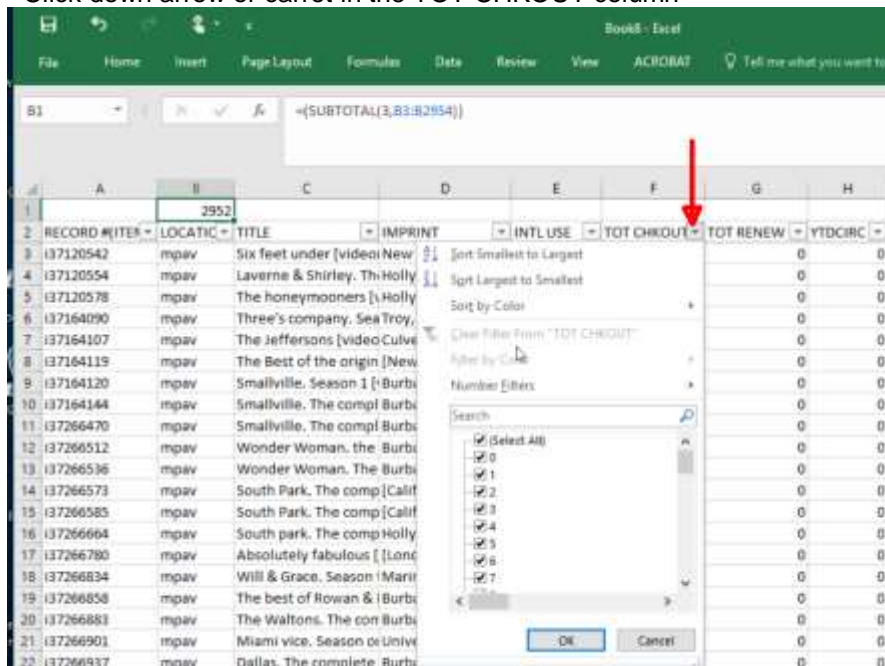
16. In cell B1 enter the formula: =(SUBTOTAL(3: first cell to count: last cell to count))  
=(subtotal(3, B3:B2954))



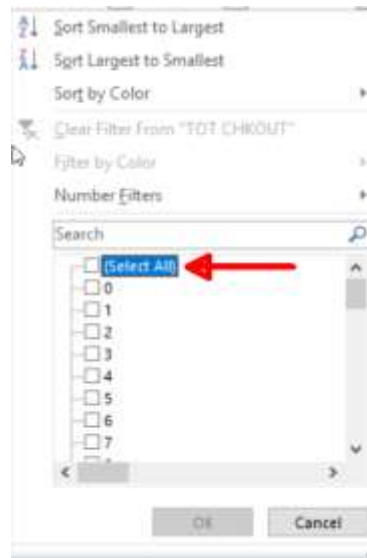
17. This gives us the total of all cells display with a filter.

18. Last we can filter and get count of results

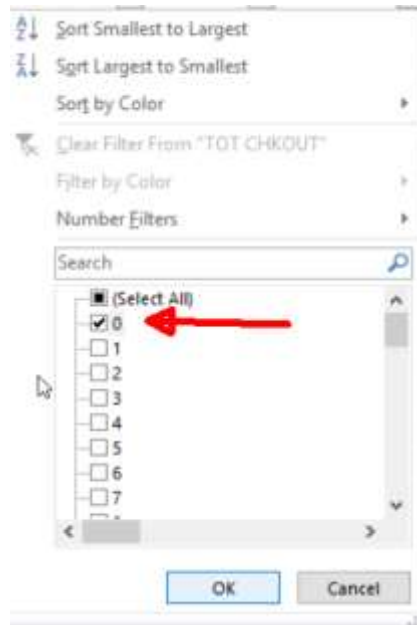
a) Click down arrow or carrot in the TOT CHKOUT column



19. Uncheck Select All



20. Select 0, and click OK



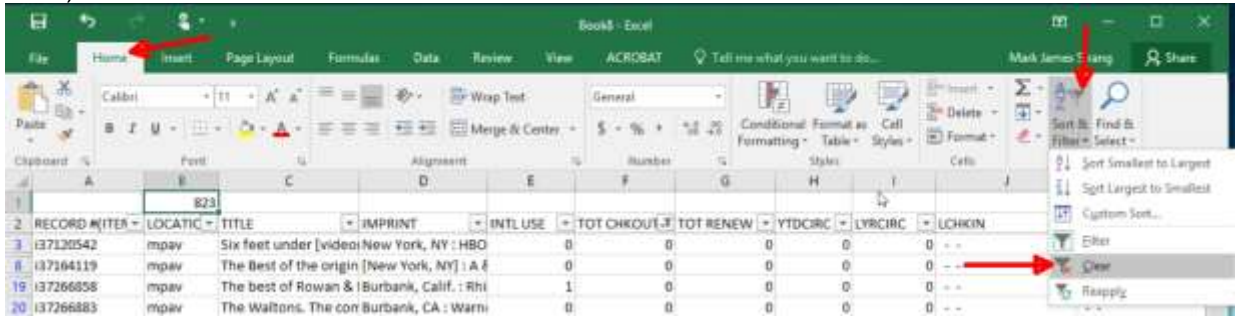
21. You have filtered the display to only items with zero checkouts!  
And the formula counts them!

Formula Bar:  $=\text{SUBTOTAL}(3, B3:B2954)$

LOCATIC	TITLE	IMPRINT	INTL USE	TOT CHKOUT
mpav	Six feet under [video]	New York, NY : HBO	0	0
mpav	The Best of the origin [New York, NY] : A &		+	0
mpav	The best of Rowan &	Burbank, Calif. : Rhi	1	0

22. To Remove All Filters

- a) Home Tab
- b) Ribbon: AZ Sort & Filter
- c) Click on Clear



## Use Sierra to create an Excel document for Shelf list reading

- Item Location = mmmo
- And(Bib bcode = -
- Or Bib bcode3=z)
- (And Item Call # >= QD455.3.e
- And Item Call # <= QD502.r)

id: creat list shelf

id: ITEM i

Start: i10000008 Stop: i60855496

**Classic**

Term	Operator	Type	Field	Condition	Value A	Value B
1			LOCATION	equal to	mmmo	
2	AND	(	BIBLIOGRAPHIC BCODE3	equal to	-	
3	OR	)	BIBLIOGRAPHIC BCODE3	equal to	z	)
4	AND	(	ITEM CALL #	greater than o...	qd 455.3 .e	
5	AND	)	ITEM CALL #	less than or e...	qd 502 .r	)

ITEM LOCATION equal to "mmmo" AND (BIBLIOGRAPHIC BCODE3 equal to "-" OR BIBLIOGRAPHIC BCODE3 equal to "z") AND (ITEM CALL # greater than or equal to "qd 455.3 .e" AND ITEM CALL # less than or equal to "qd 502 .r")

Buttons: Group, Duplicate, Insert Line

**Review Files**

All Search Records Sort Records List Records Import Records Export Records Show Records Show Info

File	Name	Current Records	Max Records	Type	Status	Login	Created [date/time]
112	patron with issues	133	5000	p	complete	strangm	10-11-2018 09:36AM
94	creat list shelf	552	2500	i	complete	strangm	10-17-2018 04:29PM
108	Create Lists Training	2952	5000	i	complete	strangm	10-17-2018 08:12AM

## Sort by Call Number

- Click Sort Records
- Choose type Item
- Choose Call #
- Click Sort

**Review Files**

All Search Records Sort Records List Records Import Records Export Records Show Records Show Info

File	Name	Current Records
112	patron with issues	133
94	creat list shelf	552
108	Create Lists Training	2952
116	innreach overdue 1	816
153	Spring 2017 patrons	7235
145	fall 2017 patrons	7299
125	Spring2016 users	7551
51	Load: Inserted records for lobbycardstab...	196
83	innreach ovdue1 101118	63
154	Fall 2015 users	7807
160	Fall 2016 users	7544
34	inn reach overdue 2 items	6
141	spring 2018	5872
144	summon updates	400000
44	resource records 8080 100118	209
82	Load: Overlaid records for NAXOS.BGSU.D	4583
81	DAVE-JEROME BIND LIST 1-17-13	1058
58	DAVE-MUSIC BIND LIST 1-17-13	83
64	DAVE-PCL PER BIND LIST 1-17-13	118

**creat list shelf**

Sorting Fields

Line	Type	Field
1	i	CALL #

Buttons: Append, Insert, Delete

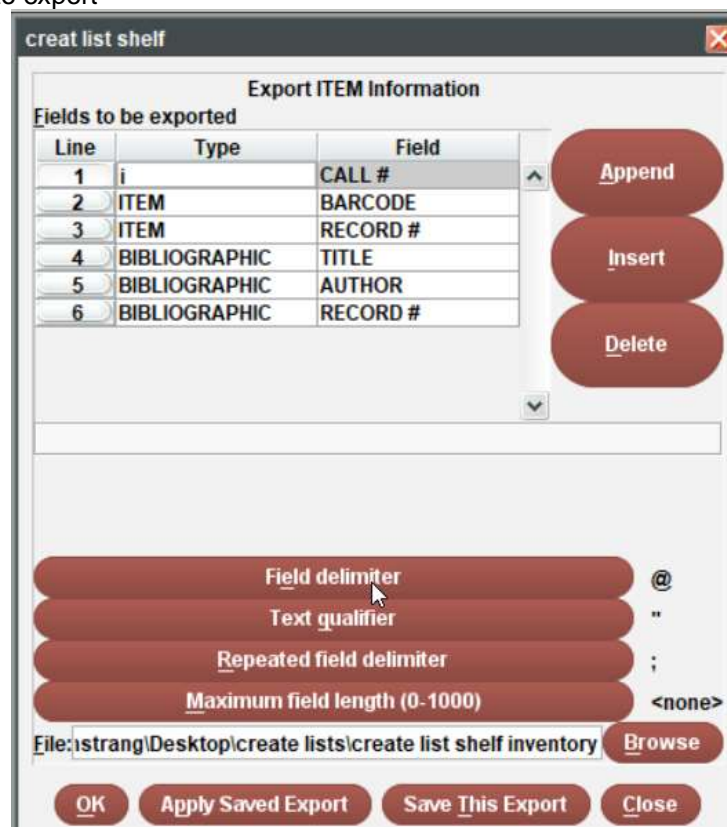
Buttons: Sort, Apply Saved Sort, Save This Sort, Close

## Highlight and hit Export Records



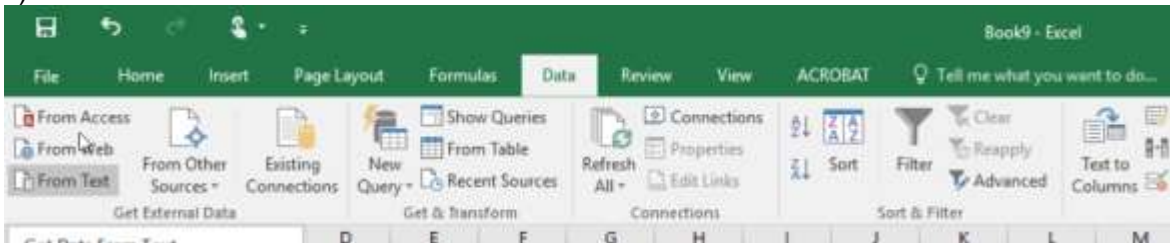
### Choose what to export

- Item Call #
- Item Barcode
- Item Record #
- Bibliographic Title
- Bibliographic Author
- Bibliographic Record #
- Choose Field Delimiter: @
- Browse to save directory and name file
- Click OK to export



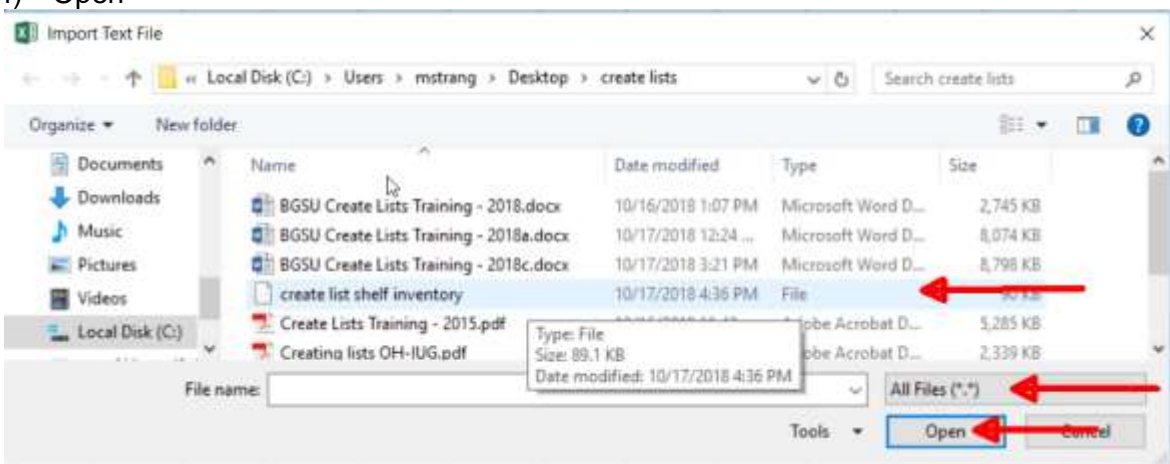
## New Excel File

- a) Choose Data tab
- b) Get External Data
- c) From Text



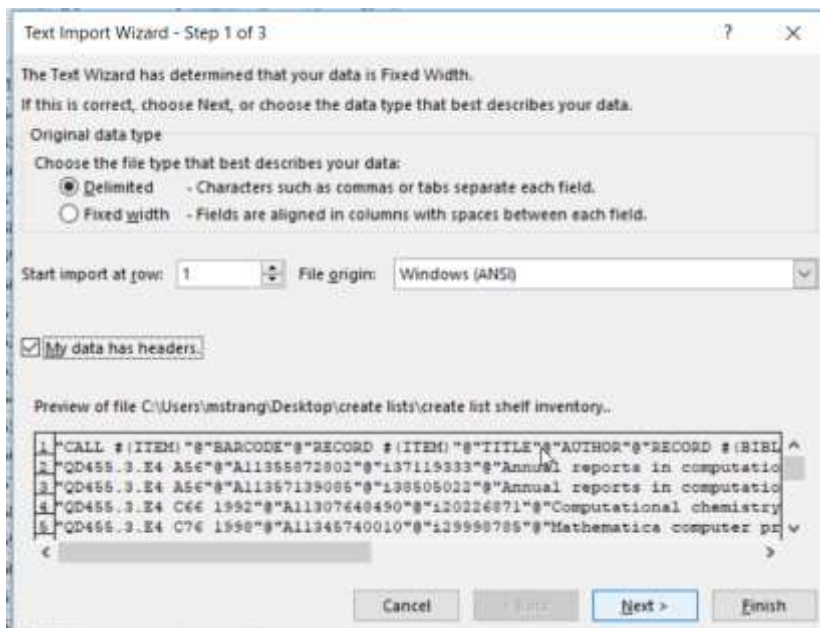
## Navigate to file to get file:

- d) Change to All Files
- e) Highlight file
- f) Open



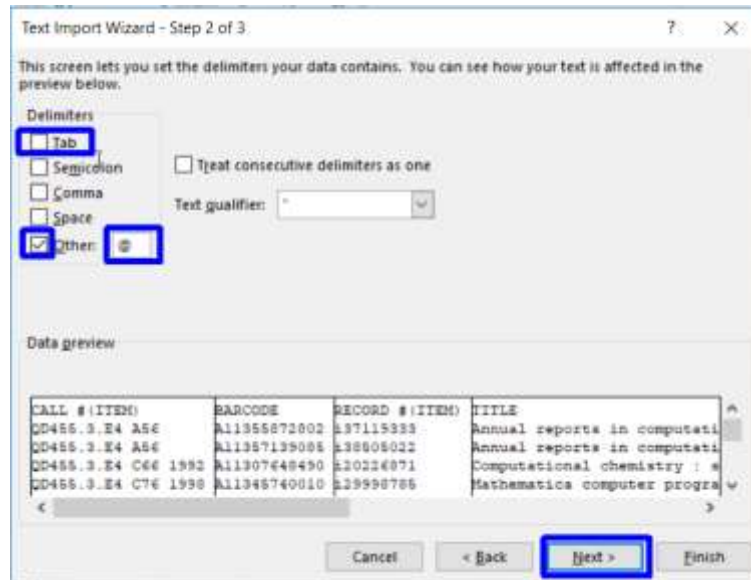
## Import Wizard step 1 of 3

- a) Make sure it's Delimited
- b) Click Next



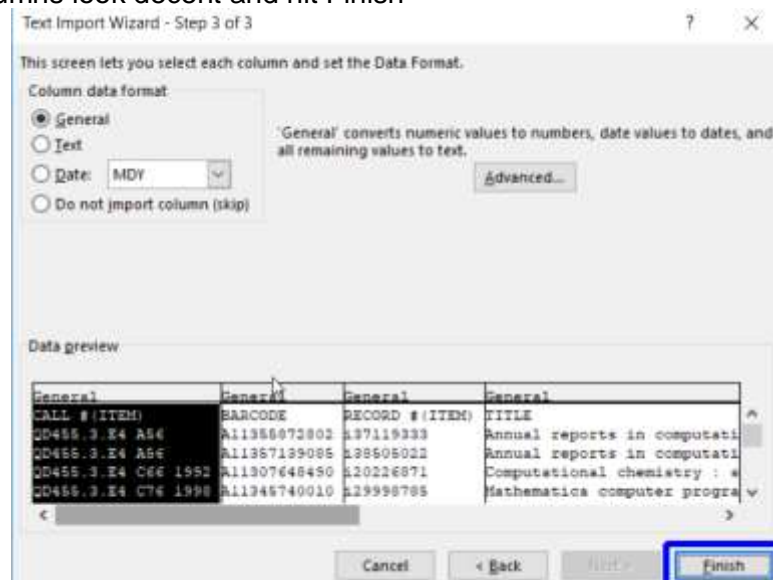
### Import Wizard step 2 of 3

- a) Uncheck Tab
- b) Checkmark other
- c) Enter @
- d) Hit Next



### Import Wizard step 3 of 3

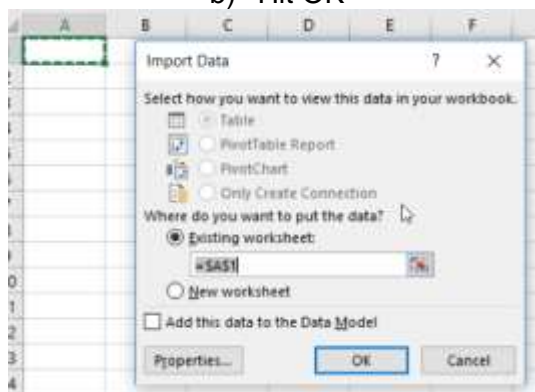
- a) Make sure columns look decent and hit Finish



## Import data screen

a) Choose column and row = \$A\$1

b) Hit OK



## Excel document

CALL #(ITEM)	BARCODE	RECORD #(ITEM)	TITLE	AUTHOR
QD455.3.E4 A56	A11355872802	i37119333	Annual reports in computational chemistry	
QD455.3.E4 A56	A11357139085	i38505022	Annual reports in computational chemistry	
QD455.3.E4 C66 1992	A11307648490	i20226871	Computational chemistry : structure, interactions, and reactivity / edited by S. Fraga	
QD455.3.E4 C76 1998	A11345740010	i29998785	Mathematica computer programs for physical chemistry / William H. Cropper	Cropper, William H
QD455.3.E4 J46 1999	A11346119305	i30581230	Introduction to computational chemistry / Frank Jensen	Jensen, Frank
QD455.3.E4 J46 2007	A11357135414	i38485138	Introduction to computational chemistry / Frank Jensen	Jensen, Frank
QD455.3.F73 R67 1998	A11345722851	i29867411	Fractals in chemistry / Walter G. Rothschild	Rothschild, Walter G., 1924-

## Insert column 1

A) Number all the lines 1 – 600 so you can sort in excel if need be

B) Number two cells and then put cursor on lower left column till double + sign

C) Drag + sign down and excel column will populate

1	CALL #(ITEM)	BARCODE	RECORD #(ITEM)	TITLE
2	QD455.3.E4 A56	A11355872802	i37119333	Annual reports in com
3	QD455.3.E4 A56	A11357139085	i38505022	Annual reports in com
4	QD455.3.E4 C66 1992	A11307648490	i20226871	Computational chemis
5	QD455.3.E4 C76 1998	A11345740010	i29998785	Mathematica compute
6	QD455.3.E4 J46 1999	A11346119305	i30581230	Introduction to compu

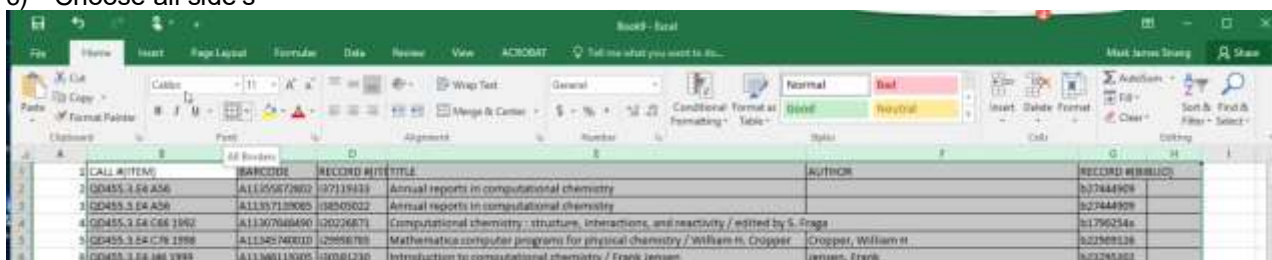
## Change Margins and layout to get entries to printout onto a sheet.

1	CALL #(ITEM)	BARCODE	RECORD #(ITEM)	TITLE
2	QD455.3.E4 A56	A11355872802	i37119333	Annual reports in computational chemistry
3	QD455.3.E4 A56	A11357139085	i38505022	Annual reports in computational chemistry
4	QD455.3.E4 C66 1992	A11307648490	i20226871	Computational chemistry : structure, interactions, and reactivity / edited by S. Fraga
5	QD455.3.E4 C76 1998	A11345740010	i29998785	Mathematica computer programs for physical chemistry / William H. Cropper
6	QD455.3.E4 J46 1999	A11346119305	i30581230	Introduction to computational chemistry / Frank Jensen



## Highlight Columns

- Under Home Tab
- Font Ribbon
- Choose all side's



## Print

- Adjust No Scaling to Fit All Columns on One Page
- Adjust Normal Margins to Narrow Margins
- Adjust Portrait Orientation to Landscape Orientation
- Adjust Print One Sided to Print on Both Sides (flip pages on long edge)
- Print



## Create Review file from Excel

- 1) Highlight contents of the column with the item record from our Pop Culture DVD file

	A	B	C	D	E
1	1	CALL #(ITEM)	BARCODE	RECORD #(ITEM)	TITLE
2	2	QD455.3.E4 A56	A11355872802	i37119333	Annual reports in computational chemistry
3	3	QD455.3.E4 A56	A11357139085	i38505022	Annual reports in computational chemistry
4	4	QD455.3.E4 C66 1992	A11307648490	i20226871	Computational chemistry : structure, interactions, and reactivity / edited by S. F
5	5	QD455.3.E4 C76 1998	A11345740010	i29998785	Mathematica computer programs for physical chemistry / William H. Cropper
6	6	QD455.3.E4 J46 1999	A11346119305	i30581230	Introduction to computational chemistry / Frank Jensen
7	7	QD455.3.E4 J46 2007	A11357135414	i38485138	Introduction to computational chemistry / Frank Jensen
8	8	QD455.3.F73 R67 1998	A11345722851	i29867411	Fractals in chemistry / Walter G. Rothschild
9	9	QD455.3.G7 V56 2006	A11357141230	i38529543	Visualizing chemistry : the progress and promise of advanced chemical imaging
10	10	QD455.3.G75 J33 2005	A11356484854	i37646485	Group theory with applications in chemical physics / P.W.M. Jacobs
11	11	QD455.3.G75 L33 1998	A11344477424	i32481032	Symmetry and group theory in chemistry / Mark Ladd foreword by Lord Lewis
12	12	QD455.3.M3 B37 1997	A11344135592	i28823357	Applied mathematics for physical chemistry / James R. Barrante

- 2) Copy column
  - a. Right click
  - b. Choose copy

	A	B	C	D	E
1	1	CALL #(ITEM)	BARCODE	RECORD #	
2	2	QD455.3.E4 A56	A11355872802	i37119333	istry
3	3	QD455.3.E4 A56	A11357139085	i38505022	Annual reports in computational chemistry
4	4	QD455.3.E4 C66 1992	A11307648490	i20226871	structure, interactions, and rea
5	5	QD455.3.E4 C76 1998	A11345740010	i29998785	ams for physical chemistry /
6	6	QD455.3.E4 J46 1999	A11346119305	i30581230	l chemistry / Frank Jensen
7	7	QD455.3.E4 J46 2007	A11357135414	i38485138	l chemistry / Frank Jensen
8	8	QD455.3.F73 R67 1998	A11345722851	i29867411	G. Rothschild
9	9	QD455.3.G7 V56 2006	A11357141230	i38529543	ogress and promise of advanc
10	10	QD455.3.G75 J33 2005	A11356484854	i37646485	ys in chemical physics / P.W.M
11	11	QD455.3.G75 L33 1998	A11344477424	i32481032	h chemistry / Mark Ladd fore
12	12	QD455.3.M3 B37 1997	A11344135592	i28823357	ysical chemistry / James R. Bar
13	13	QD455.3.M3 B37 2004	A11353618363	i35710457	ysical chemistry / James R. Bar
14	14	QD455.3.M3 B57 1993	A11346166801	i21552976	istry, and biophysics : an int
15	15	QD455.3.M3 F55 1980	A11300103881	i14634764	l chemical applications / R.L.
16	16	QD455.3.M3 F73 1988	A11309404181	i18528478	knots, and algebraic quantun
17	17	QD455.3.M3 G66 1997	A11344099251	i28554061	nists / Jerry Goodisman
18	18	QD455.3.M3 H38 1995	A11321819614	i24856204	v Harrison
19	19	QD455.3.M3 M67 1999	A11346161273	i30737278	Mathematics for physical chemistry

Context menu options visible over cell D3:

- Calibri 11
- B I
- Cut
- Copy
- Paste Options:
  - Paste Special...
  - Insert Copied Cells
  - Delete
  - Clear Contents
  - Format Cells...
  - Column Width...
  - Hide
  - Unhide

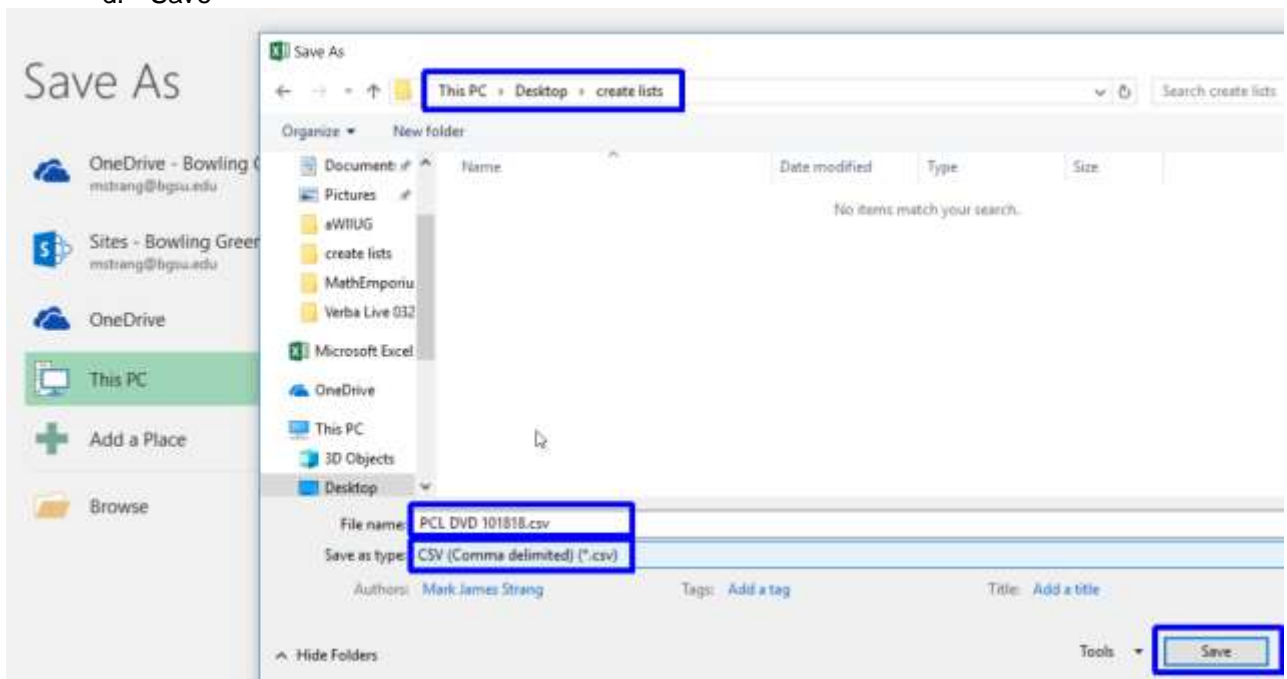
- 3) In new excel document
  - a. Put cursor in A1
  - b. Right click
  - c. Press paste

	A	B	C	D
1	RECORD #(ITEM)			
2	i37119333			
3	i38505022			
4	i20226871	Paste Options:		
5	i29998785			
6	i30581230			
7	i38485138			
8	i29867411			

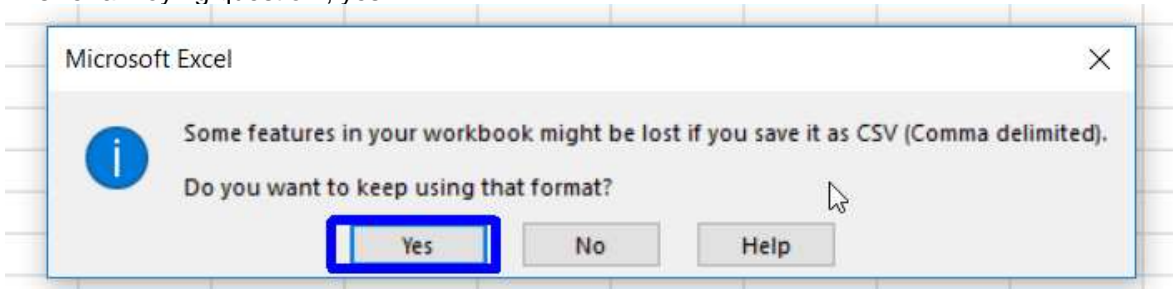
- 4) Message file
  - a. Delete row 1 with RECORD #(ITEM)

	A
1	i37119333
2	i38505022
3	i20226871

- 5) Save as CSV
  - a. Navigate to folder
  - b. Name file
  - c. Select as type: change to CSV )Comma delimited)(\* .csv)
  - d. Save



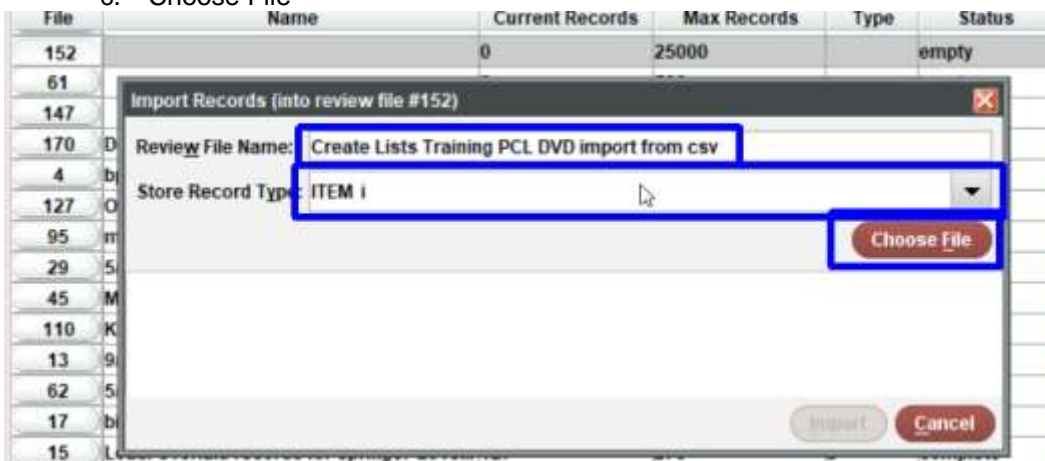
- 6) Answer annoying question , yes



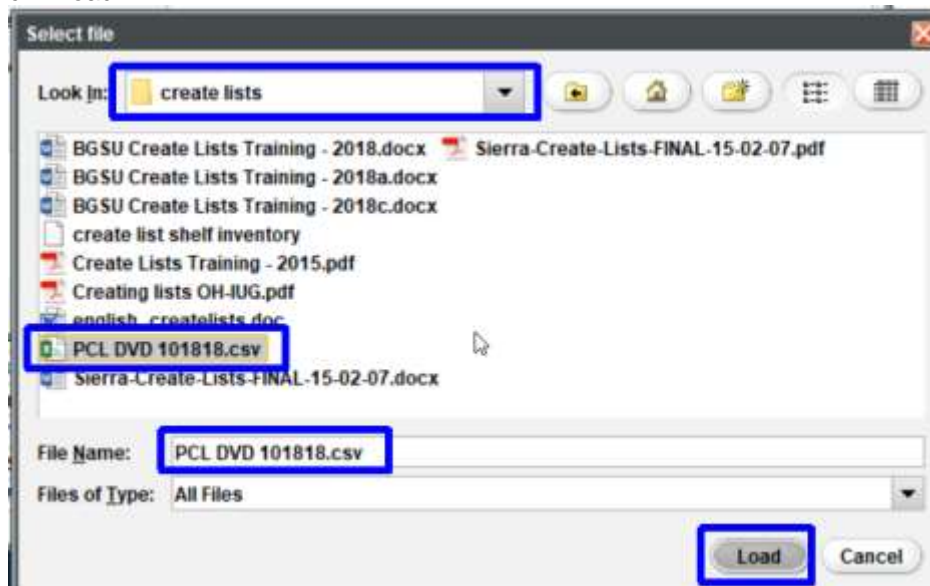
- 7) Sierra Create Lists
  - a. Click on Import Records



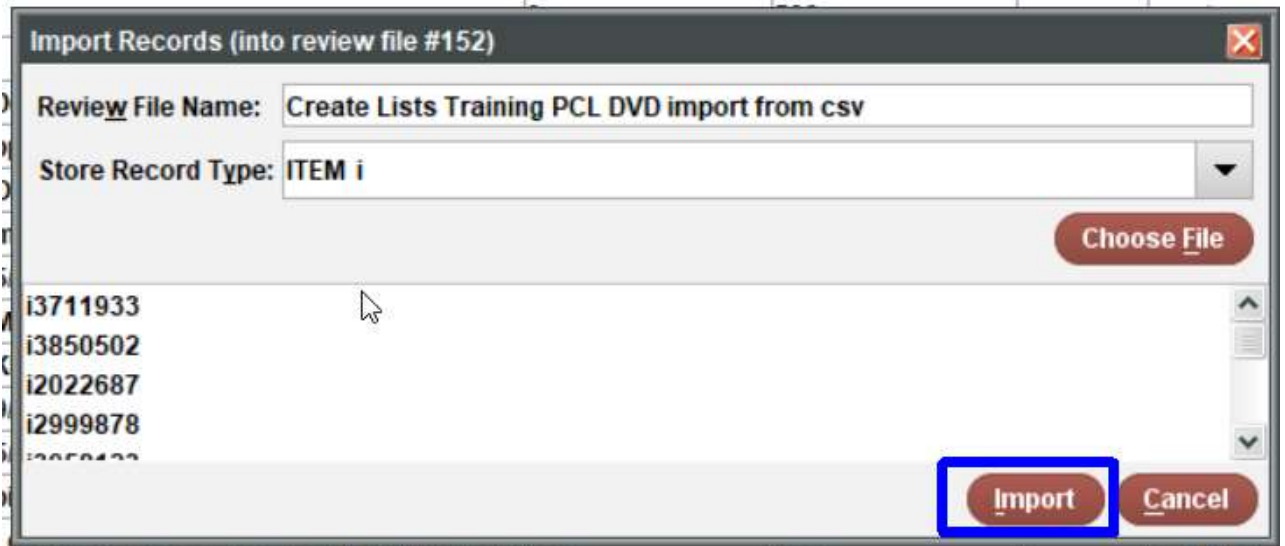
- 8) Sierra Import Records
  - a. Name Review File
  - b. Choose the record type item for Store Record Type
  - c. Choose File



- 9) Select File
  - a. Navigate to folder
  - b. Highlight file name you want to import
  - c. Load



- 10) Import Records (into review file # 152
  - a) Click Import



- 11) Voila, review file is created from your modified Excel file!  
 (In this case we still have 552 records like the original export!)

Review Files							
All							
<a href="#">Search Records</a> <a href="#">Sort Records</a> <a href="#">List Records</a> <a href="#">Import Records</a> <a href="#">Export Records</a> <a href="#">Show Records</a> <a href="#">Show Info</a>							
File	Name	Current Records	Max Records	Type	Status	Login	Created [date:time]
108	Create Lists Training	2952	5000	i	complete	strangm	10-17-2018 08:12AM
116	innreach overdue 1	816	5000	p	complete	strangm	10-11-2018 08:15AM
152	Create Lists Training PCL DVD import fro...	552	25000	i	complete	strangm	10-18-2018 09:58AM
145	fall 2017 patrons	7299	20000	p	complete	strangm	01-04-2018 02:36PM

- 12) Open review file and inspect records:

## Find Bibliographic Records with no attached records (Data Cleaning)

You come across this record in the public catalog and something looks off:

<http://Maurice.bgsu.edu/record=b2679386>

RECORD #  View Entire Collection

Limit search to items available for checkout

Author	Glass, Philip
TITLE	Greta's song (streets of Berlin)
Imprint	London: Chester Music
Permalink	http://maurice.bgsu.edu/record=b2679386~S9

Pull it up in Sierra, huh it only has an order record

b26793866  
 AUTHOR Glass, Philip  
 TITLE Greta's song (streets of Berlin)  
 LOCATIONS mu

Summary	Summary
Rec... o3054093	View a All <input type="button" value="Delete"/>
Sele... o3054093	
Pay... o3054093	
Bib-Level H... 0	

#	Record Number	DESCRIPTION
✓ 1	o3054093	LOCATION:mumo FUND:ln003 STATUS:a IDENTITY:Score & 1 part

Let's look at the Bibliographic record

b26793866 Last Updated: 07-26-2016 Created: 06-14-2004 Revisions: 6

LANG	eng English	CAT DATE	--	BCODE3	-
SKIP	0	BIB LVL	m MONOGRAPH	COUNTRY	
LOCATION	mn Music Library	MAT TYPE	e SCORE		

a Glass, Philip  
 t Greta's song (streets of Berlin)  
 p London: Chester Music

We see the bcode3= - so it displays to the public

The record is kind of brief so it was probably never properly cataloged.

Lets look closer at the order record:

o3054093 Last Updated: 01-06-2010 Created: 06-14-2004 Revisions: 3

ACQ TYPE	p PURCHASE	CODE4	--	RDATE	06-14-2004
LOCATION	mumo Music Library Open Stacks	E PRICE	\$27.00	RLOC	m MUSIC LIBRARY
CDATE	--	FORMAT	w SCORE	BLOC	m MUSIC LIBRARY
CLAIM	---	FUND	ln003 Music-T. Front	STATUS	a FULLY PAID
COPIES	1	ODATE	05-04-2004	TLOC	m MUSIC LIB
CODE1	k KAG	ORD NOTE	---	VENDOR	fron Theodore Front Musical Literature (Approvals)
CODE2		ORD TYPE	z OTHER	LANG	eng English
CODE3	--N/A	REACTION	---	VOLUMES	1

i Score & 1 part  
 n Send to Music before cataloging

PAID	DATE	INVD	INV#	AMT	VOUCHER	COPIES	FOR CURR	NOTE
	06-15-2004	05-04-2004	37206	\$27.85	24372	001		Greta's song

The order record was created in June of 2004 and was last updated Jan 2010.

A title search of the record shows:

Format	Description	Summary
1	Indexed Entry: <i>Greta's song (streets of Berlin)</i> Greta's song (streets of Berlin) Glass, Philip Music Library	b26793866 Not Available No Items 1 Order
2	Indexed Entry: <i>Greta's song : Streets of Berlin : for voice and piano</i> Bent, Greta's song Greta's song : Streets of Berlin : for voice and piano Glass, Philip DU10194 Chester Music Music Library	b26916812 Available 2 Items

In this case it looks like staff created a new Bibliographic and Item record when they cataloged the physical item in OCLC instead of overlaying it on the Bibliographic record with the order record on it. I wondered if there are other records like this.

Review File Name: Bib records with no attached item records

Store Record Type: BIBLIOGRAPHIC b

Range Start: b10000008 Stop: b64345452

Term	Operator	Type	Field	Condition	Value A	Value B
1		BIBLIOGRAPHIC	LOCATION	equal to	mu	
2	AND	BIBLIOGRAPHIC	MAT TYPE	equal to	c	
3	AND	BIBLIOGRAPHIC	LINKED REC	not exist to	ITEM	

BIBLIOGRAPHIC LOCATION equal to "mu " AND BIBLIOGRAPHIC MAT TYPE equal to "c " AND BIBLIOGRAPHIC LINKED REC not exist to ITEM

I used the field "LINKED REC" with the Condition of "not exists to" to find Bib records that do not have attached item records. The Bib loc = mu and the Mattype = c were used to avoid getting serials which frequently don't have item records but are correct.

160	Bib records with no attached item records	228	10000
-----	---	-----	-------

I ended up with 228 records that I'll need Music or Acquisition's to investigate and fix one by one.

### Odd Variable Field characters

Problem: The depository found that instead of having a numerical based check digit at the end of some barcodes they had a special character: % or -

Summary	Record																								
<b>Rec... i11437078</b>	<b>Not checked out</b>																								
<b>Item-Level ... 0</b>	<b>i11437078 Last Updated: 07-25-2011 Created: 05-07-1992 Revisions: 11</b>																								
<b>Bib-Level H... 0</b>																									
	<table border="1"> <tr> <td>PRICE</td> <td>\$100.00</td> <td>ODUE DATE</td> <td>- -</td> </tr> <tr> <td>OUT DATE</td> <td>- - :</td> <td>IUSE3</td> <td>0</td> </tr> <tr> <td>OUT LOC</td> <td>0</td> <td>RECAL DATE</td> <td>- -</td> </tr> <tr> <td>DUE DATE</td> <td>- -</td> <td>TOT CHKOUT</td> <td>0</td> </tr> <tr> <td>PATRON#</td> <td>0</td> <td>TOT RENEW</td> <td>0</td> </tr> <tr> <td>LPATRON</td> <td>0</td> <td>LOUTDATE</td> <td>- - :</td> </tr> </table>	PRICE	\$100.00	ODUE DATE	- -	OUT DATE	- - :	IUSE3	0	OUT LOC	0	RECAL DATE	- -	DUE DATE	- -	TOT CHKOUT	0	PATRON#	0	TOT RENEW	0	LPATRON	0	LOUTDATE	- - :
PRICE	\$100.00	ODUE DATE	- -																						
OUT DATE	- - :	IUSE3	0																						
OUT LOC	0	RECAL DATE	- -																						
DUE DATE	- -	TOT CHKOUT	0																						
PATRON#	0	TOT RENEW	0																						
LPATRON	0	LOUTDATE	- - :																						
	<table border="1"> <tr> <td>c</td> <td>090</td> <td>LD4191.O6no.3783</td> </tr> <tr> <td>b</td> <td></td> <td>810320290908%</td> </tr> <tr> <td>b</td> <td></td> <td>A11349050960</td> </tr> </table>	c	090	LD4191.O6no.3783	b		810320290908%	b		A11349050960															
c	090	LD4191.O6no.3783																							
b		810320290908%																							
b		A11349050960																							

Tried using conditions: “has” and “ends with” no luck  
 However, they condition: “matches” picked right up on them:

Term	Operator	Type	Field	Condition	Value A
1		ITEM	LOCATION	starts with	r
2	AND	ITEM	BARCODE	matches	%
3	OR	ITEM	BARCODE	matches	-
4	AND	ITEM	BARCODE		

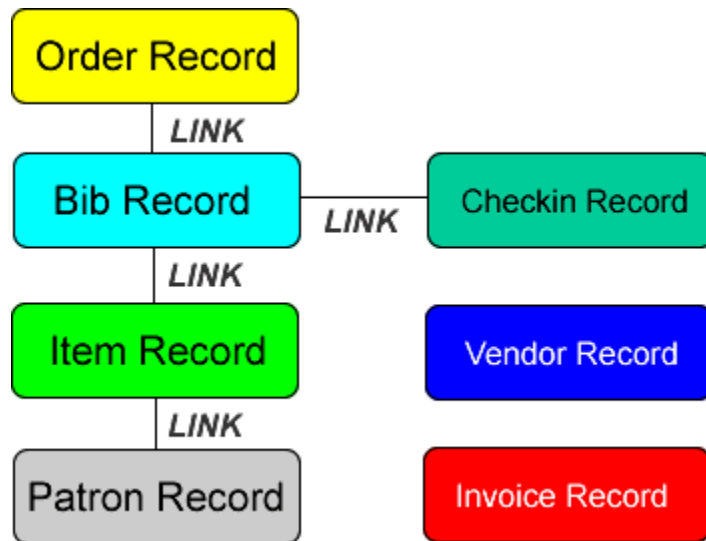
  

File	Name	Current Records	Max Records	Type	Status
120	To re-barcode	132	5000	i	complete

### Appendix A. The Law of One Hop

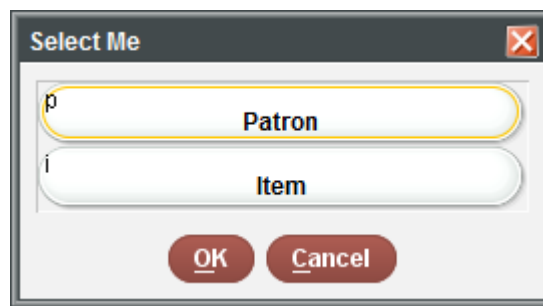
You can always work with data in the selected record type, and records that are directly linked to it. This applies to searching, sorting, listing and exporting.



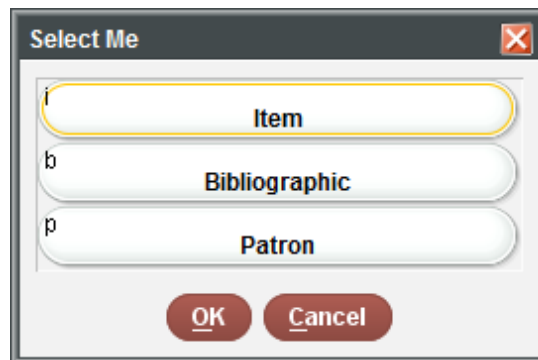


This diagram helps to explain why different **types** are available in the table for search criteria depending on the type of record you chose in the **Store Record Type** field.

If your review file lists Patron Records, you can use patron or item record types in your search string:



If your review file lists Item Records, you can use item, bib or patron types in your search string:



This manual is a modified version of a **Create Lists Manual** created by Steve Hesser, MCFLS who based his manual upon Stephanie Zimmerman of the Library System of Lancaster County, Pennsylvania.

## Appendix B: Other Resources:

Create Lists Maine InfoNET

<http://www.maineinonet.org/supportportal/training/create-lists/>

Create Lists - Steve Hesser, MCFLS

<http://www.mcfls.org/createlists/> 1 hour 30 minutes Oct. 20, 2016

Create Lists Manual Steve Hesser, MCFLS and Stephanie Zimmerman of LS of LC, PN

<http://www.mcfls.org/createlists/Create%20Lists%20Training%20-%202015.pdf>

## You Tube Videos

Introduction to Create Lists Steve Hesser, MCFLS 10/12/17

[https://www.youtube.com/watch?v=LbYrt\\_IPUdQ](https://www.youtube.com/watch?v=LbYrt_IPUdQ) 1 hour 10 minutes

slides: [https://drive.google.com/file/d/0B-U\\_wAllpPbMmdxZ3dGMzJmSm8/view](https://drive.google.com/file/d/0B-U_wAllpPbMmdxZ3dGMzJmSm8/view)

Advanced Create Lists and Sierra Statistics, Steve Hesser, MCFLS 11/1/17

<https://www.youtube.com/watch?v=GFdAPSlpdh4> 2 hours

slides: [https://docs.google.com/presentation/d/1frRYD05uAly\\_512-YtxYlxo3PhQPI2yH8WmFqTcguuw/edit#slide=id.p4](https://docs.google.com/presentation/d/1frRYD05uAly_512-YtxYlxo3PhQPI2yH8WmFqTcguuw/edit#slide=id.p4)

[https://docs.google.com/presentation/d/1frRYD05uAly\\_512-YtxYlxo3PhQPI2yH8WmFqTcguuw/edit#slide=id.p4](https://docs.google.com/presentation/d/1frRYD05uAly_512-YtxYlxo3PhQPI2yH8WmFqTcguuw/edit#slide=id.p4)

Web Management Reports Steve Hesser, MCFLS

[https://www.youtube.com/watch?v=20zU\\_5K7PB8](https://www.youtube.com/watch?v=20zU_5K7PB8) 2 hour

## Innovative Sierra Training Website (new 2020)

<https://innovative.libguides.com/Sierra>

**innovative**  
a HEBBARD COMPANY

Innovative Interfaces | support.iii.com | Sierra | Welcome

Sierra: Welcome

Sierra Training and Learning Resources

Search Sierra training material:

Welcome Acquisitions Cataloging Serials Circulation Digital Collections OPAC/Discovery System Administration Reporting Tools

Go to Sierra Home

Introduction to Sierra Training and Learning Center

**What is the Sierra Training and Learning Center (STLC)?** The Sierra Training and Learning Center is a new training website, built on the LibGuides platform, for storing and sharing training resources with our library partners.

**What type of resources are included in the Sierra Training and Learning Center?** We include a variety of training documentation such as Sierra WebHelp, training agendas, Quick Start Guides, checklists, how to articles and videos, recordings of live webinars and links to other useful Innovative resources.

**How is the Sierra Training and Learning Center organized?** The Sierra Training and Learning Center is organized by system functionality. Browse training resources by functionality using the tabs at the top - such as by functionality using the tabs at the top - such as acquisitions, cataloging, patron services, digital collections, OPAC and discovery, serials, system administration, and reporting. The Welcome tab provides access to all the training agendas, Sierra Quick Start Guides, navigation tips, and training resources news and highlights.

**Can I search the Training and Learning Center?** Use the search box on the top right corner to search the Sierra Training and Learning Center.

**Does Sierra WebHelp require authentication?** Now, Innovative offers free access with no authentication to the Sierra WebHelp.

## Sierra Manual:

Web based access now available: <https://documentation.iii.com/sierrahelp/Default.htm>

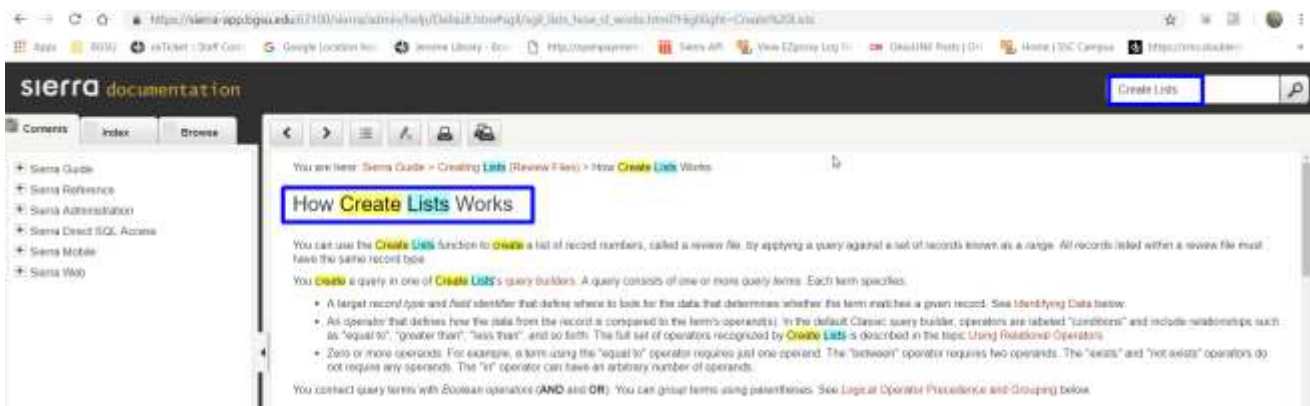
Sierra - Hosted: Jerome Library -- Bowling Green State Univ - Mark Strang - LITS

File Edit View Go Tools Reports Admin Help

sierra

Manual

FUNCTION Create Lists



## Appendix C. Boolean Conditions

For each fixed- or variable-length field you want to search, you can specify a Boolean condition that the field must meet. Boolean conditions are terms or symbols that tell the system the relationship between the fields that you want to search and the data in that field.

### = (equal to)

Equal to means just what you expect; the data in the record should match the data in the query. It must *exactly* match the characters keyed as the **Value**. This is great for working with any of the fixed-length fields. It's not usually recommended for use with variable fields, since it's looking for an exact match. *Author=Dickens Charles*, for example, won't find records with dates after the name.

Before making the comparison, the system "normalizes" the data. Sierra converts punctuation and subfield delimiters to spaces and converts double spaces to single spacing. The search statement is normalized by making it lowercase.

#### Example:

Using the equal to condition, a list is generated of the all MPL Senior patrons by PTYPE.

Term	Operator	Type	Field	Condition	Value A	Value B
1		Patron	P TYPE	equal to	4	

### Absence of a Field

You can also use the equals sign to find all the records that **do not** contain a particular variable field. You choose the field name, use the equals to condition and leave the value space blank. This search means *find records for which that field equals nothing*. You could use this to find patrons who do not have an e-mail address in their record, or items that do not have a call number.

#### Example:

Using the equal to condition, a list is generated of MPL Senior patrons that do not have e-mail addresses:

Term	Operator	Type	Field	Condition	Value A	Value B
1		Patron	P TYPE	equal to	4	
2	AND	Patron	EMAIL ADDR	equal to		

### != (not equal to)

The field does not exactly match the characters keyed as the **Value**. This one works like the equals sign, only it excludes rather than includes records that match the criteria that you specify. It's very useful for working with fixed-length fields. This operator is NOT recommended for searching variable-length fields. If you use this operator alone to search variable-length fields, the system can retrieve virtually the entire database.

Before making the comparison, the system "normalizes" the data. Sierra converts punctuation and

subfield delimiters to spaces and converts double spaces to singlespacing. The search statement is normalized by making it lowercase.

**Example:**

Using the not equal to condition, a list is generated of all books in the Franklin collection that are not available:

Term	Operator	Type	Field	Condition	Value A	Value B	
1		Item	ITEM LOC	has	10		▲
2	AND	Item	STATUS	not equal to	-		

**Presence of a Field**

You can use the not equal to condition to find all the records that **do** contain a particular variable field. You choose the field name, use the not equal to condition and leave the value space blank. This search means *find records for which that field does not equal nothing*. You could use this to find patrons who do have an e-mail address in their record.

- > (greater than)
- < (less than)
- >= (greater than or equal to)
- <= (less than or equal to)

These are mostly used for fixed fields containing numerical data, like dates and money, and work exactly the way you would expect them to. The only tricky part here is making sure you are using the right one. Be careful when using either less than operator; remember that a blank field is going to be less than whatever value you specify. If you search for DVDs whose due date is less than 11-12-2013 (long overdue DVDs), you'll get all the items with a blank due date, because they are not checked out.

Both the search statement and the data from the record are "normalized" by making all characters lowercase. Sierra leaves all punctuation marks and spaces as they are.

**Examples:**

To find all patrons who owe fines in excess of \$5.00.

Term	Operator	Type	Field	Condition	Value A	Value B
1		Patron	MONEY OWED	greater than	5.00	

Searching MONEY OWED >= would capture all patrons with fines \$5.00 and above.

Term	Operator	Type	Field	Condition	Value A	Value B
1		Patron	MONEY OWED	greater than or equal to	5.00	

**H (has)**

This option looks for the specified data anywhere in the record and is commonly used for variable-length fields. The characters keyed must match exactly, including spacing, punctuation and subfield delimiters. MARC subfield delimiters need to be included in the search if they fall within the string to be searched.

Both the search statement and the data from the record are "normalized" by making all characters lowercase. Sierra leaves all punctuation marks, spaces and subfield delimiters as they are.

**Examples:**

This is great for making shelf lists. Use the Item's ITEM LOC has and include your library's number to see your whole collection (CAUTION: this is a big list).

Term	Operator	Type	Field	Condition	Value A	Value B
1		Item	ITEM LOC	has	10	

You could search within a call number. This search string would find any book that includes the phrase "mys" at the end as well as the beginning or anywhere else within a call number. **Note that Sierra will convert all uppercase characters to lowercase (Create Lists is case-insensitive)**

Term	Operator	Type	Field	Condition	Value A	Value B
1		Item	CALL NO.	has	mys	

Here's a trick: To find a word at the beginning of a variable-length field, insert subfield delimiter **a** in your search. If you want to find all Titles that begin with the word "the" but not the titles that have "the" elsewhere.

Term	Operator	Type	Field	Condition	Value A	Value B
1		Bibliographic	TITLE	has	athe	

**A (All Fields don't have)**  
**O (At Least one Field doesn't have)**

These two operators are used to find records that don't have a certain string of text in a particular field.

**Examples:**

Search for item records where there is no intrinsic message:

Term	Operator	Type	Field	Condition	Value A	Value B
1		Item	MESSAGE	All Fields don't have	transit	

Search for records where at least one of the AUTHOR fields does not contain the text "Christie". In this example, a record that also had "Westmacott" (Agatha Christie's pseudonym) in an AUTHOR field would be retrieved.

Term	Operator	Type	Field	Condition	Value A	Value B
1		Bibliographic	AUTHOR	At Least one Field doesn't have	christie	

**W (between)**  
**N (not within)**

You can use W or N to specify a range, usually used for fixed-length fields containing dates or numbers. If you chose the "between" or "not within" condition, you must enter a second value in the **Value B** cell. These conditions are better for date searches than > and < which will retrieve blank dates.

**Examples:**

To find items cataloged in 2013, use CAT DATE between 01-01-2013 and 12-31-2013.

Term	Operator	Type	Field	Condition	Value A	Value B
1		Bibliographic	CAT DATE	between	01-01-2013	12-31-2013

To exclude all items cataloged in 2003, use CAT DATE not within 01-01-2013 and 12-31-2013

Term	Operator	Type	Field	Condition	Value A	Value B
1		Bibliographic	CAT DATE	not within	01-01-2013	12-31-2013

**E (exist)**  
**n (not exist)**

These operators are used for **date fields** that have (exist) or do not have (not exist) content.

**Examples:**

To find item records with LCHKIN dates use this example.

Term	Operator	Type	Field	Condition	Value A	Value B
1		Item	LCHKIN	exist	--	--

To find patron records without EXP DATES use this example.

Term	Operator	Type	Field	Condition	Value A	Value B
1		Patron	EXP DATE	not exist	--	--

## ^ (starts with)

Use this operator to find fields in which a given word or phrase appears at the beginning of the field. The comparison between the word or phrase you enter, and the beginning of the field is case insensitive, thus "Journal of" and "journal of" will produce the same results. Leading |a subfield delimiters and MARC tags and indicators are ignored when checking the beginning of a field.

### Example:

If one is working on a shelf list biographical works, they may do a search such as this:

Term	Operator	Type	Field	Condition	Value A	Value B	
1		Item	CALL NO.	starts with	92		^

## \$ (ends with)

Use this operator to find fields in which a given word or phrase appears at the end of the field. The comparison is case insensitive. Punctuation is included as part of the comparison, so if you enter "cultural studies" and a field ends with "cultural studies." (Note the period), then this field would not match.

### Example:

To find items whose Bibliographic Subject fields end in Fiction:

Term	Operator	Type	Field	Condition	Value A	Value B	
1		Bibliographic	SUBJECT	ends with	fiction		\$

## Relative Date Operators

These relative date operators are great for saved queries since you do not have to change the dates. The dates retrieved are relative to the date the review file was created.

### t (equals today)

### y (equals yesterday)

Use these relative date operators to identify records with date fields matching today's date or yesterday's date. The dates considered 'today' or 'yesterday' are relative to the date the review file is created. For example, a review file created with one of these relative date operators will most likely return different results today as opposed to if the same criteria is run a week from today.

### Example:

To find items with a date created of yesterday:

Term	Operator	Type	Field	Condition	Value A	Value B	
1		Item	CREATED	equals yesterday			

### v (within last week)

### m (within last month)

While the previous operators look at specific dates, these two look at any date within the range specified—either within the last week or within the last month. As with other relative date operators, the records returned are all relative to the date the review file is created.

### Example:

To find patrons created within the last month:

Term	Operator	Type	Field	Condition	Value A	Value B	
1		Patron	CREATED	within last month			

- a (is this many days ago)
- b (is this many weeks ago)
- c (is this many months ago)

These relative date operators work in much the same way as the others previously mentioned, but unlike those these also require a number to identify how far back Sierra needs to look relative to the date the review file is created. All of these will identify a specific day x days ago, x weeks ago or x months ago where x is the number specified in the criteria.

**Example:**

To find patron records created one month ago. If this file is run on 10/21/15, the created date in the records returned would be 09/21/15.

Term	Operator	Type	Field	Condition	Value A	Value B
1		Patron	CREATED	is this many months ago	1	

R (matches) – Regular Expressions

This works like the **H (has)** operator, but allows you to do pattern matching using POSIX regular expressions. Like the H (has) operator, the Value A (or regular expression) does not need to exactly match the entire field, as required by the = (**equal to**) operator. This can get complicated, but the more common uses are simple.

+ Plus Sign

Match one or more of the preceding characters.

Example: DESCRIPT matches x+i+

Matches records with DESCRIPT fields containing “**xi**, 318 p. ;|c18 cm|,” “**xii**, 610, [29] p.,” “**xix**, 374 p.,” and “**xxii**, 314 p.”

Term	Operator	Type	Field	Condition	Value A	Value B
1		Bibliographic	DESCRIPT	matches	x+i+	

\* Asterisk

Match zero or more of the preceding characters.

Example: TITLE matches Canad\*

Matches records with TITLE fields containing “**Canada**” and “**Canadian**”.

Term	Operator	Type	Field	Condition	Value A	Value B
1		Bibliographic	TITLE	matches	canad*	



## Appendix D Handy Notes: