BGSU

University Libraries

Sierra

Create Lists Training

12/15/20
12/16/20
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01/07/21

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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.

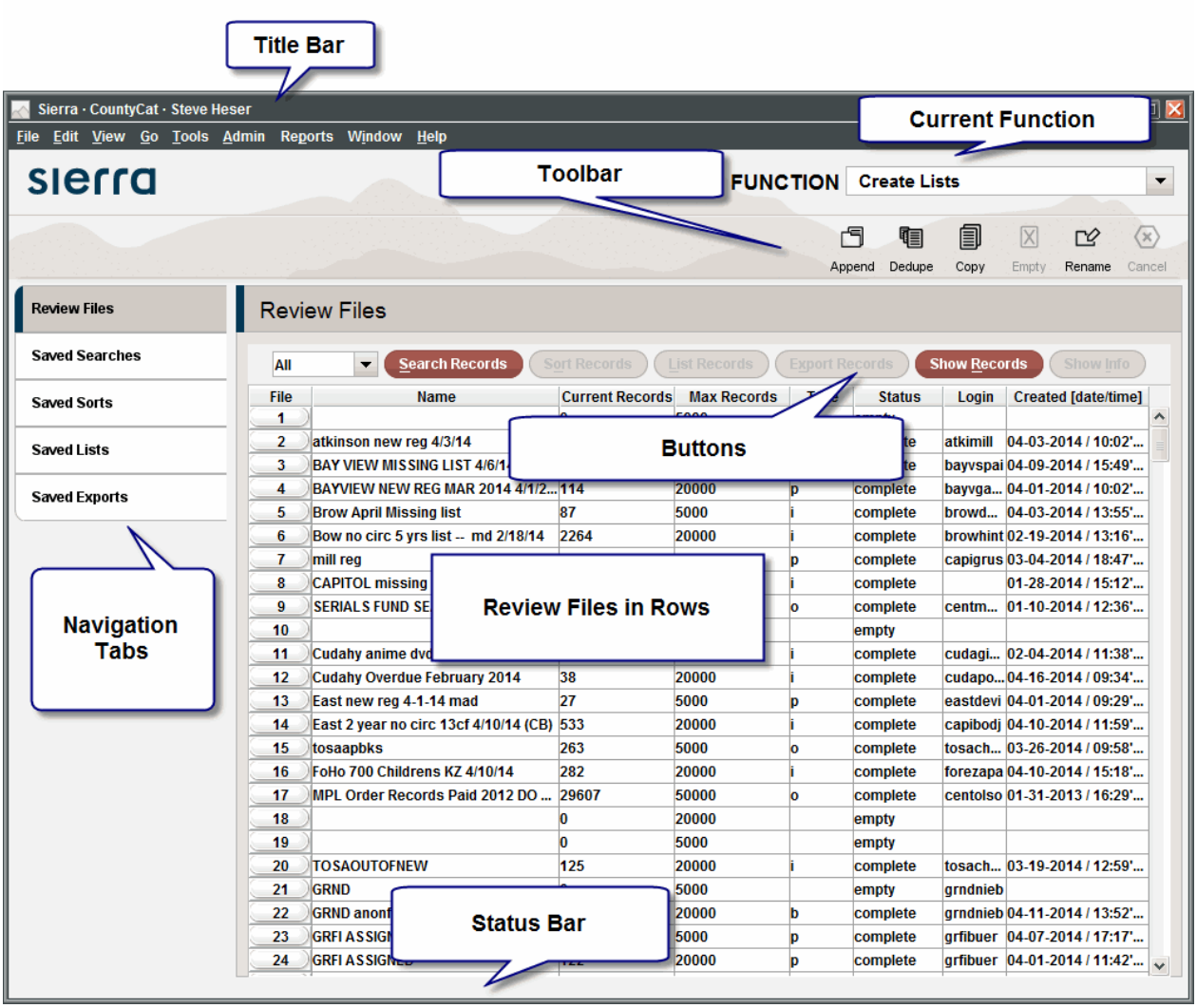
Contents

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.

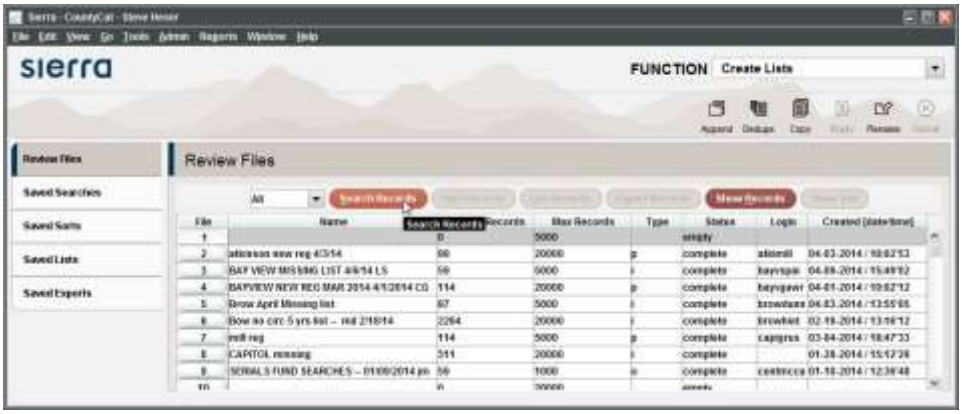
Creating a New Review File

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

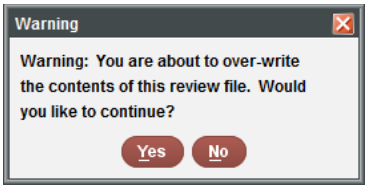
1. Choose an empty review file by selecting and highlighting its row. You can also choose an existing review file to erase overwrite (Generally, only overwrite or delete files you created!).
2. To find empty review files click on the Current Records column title, to cause the review files to be sorted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

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

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:

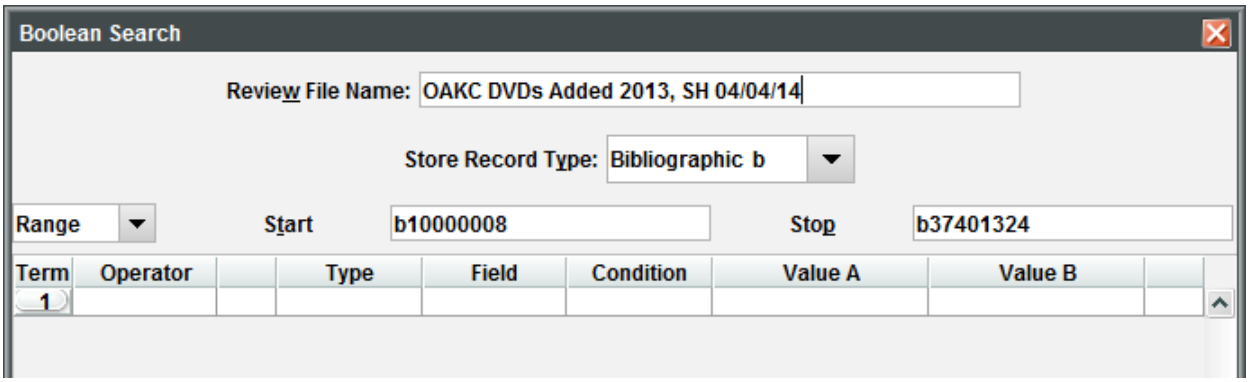
9. Enter your search criteria (see Specifying Search Criteria below for more information).
10. Begin your search by clicking the **Search** button at the bottom of the window.

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)

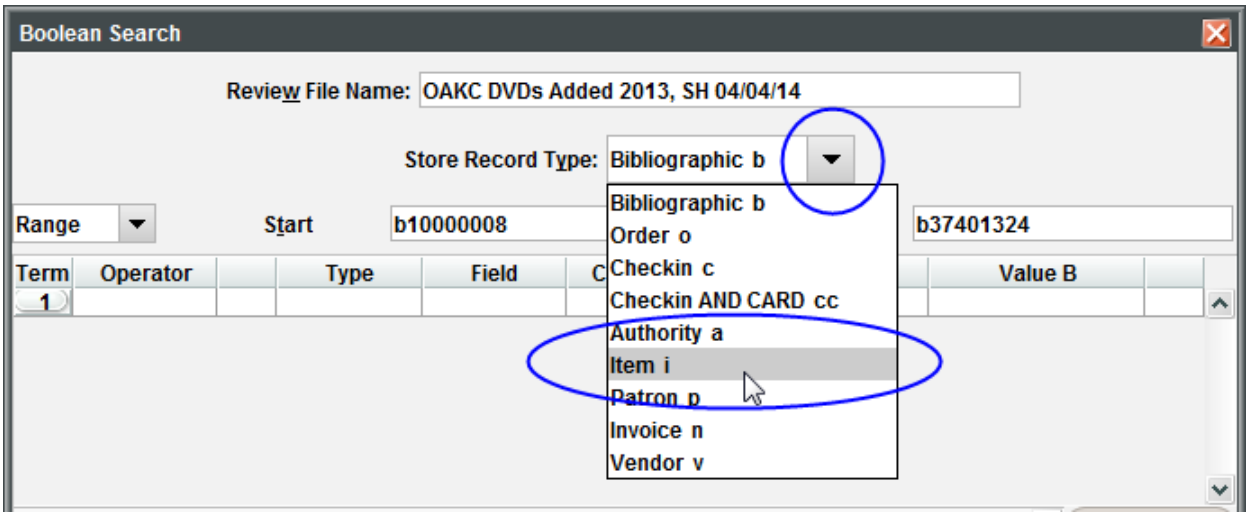


Selecting a Record Type

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).

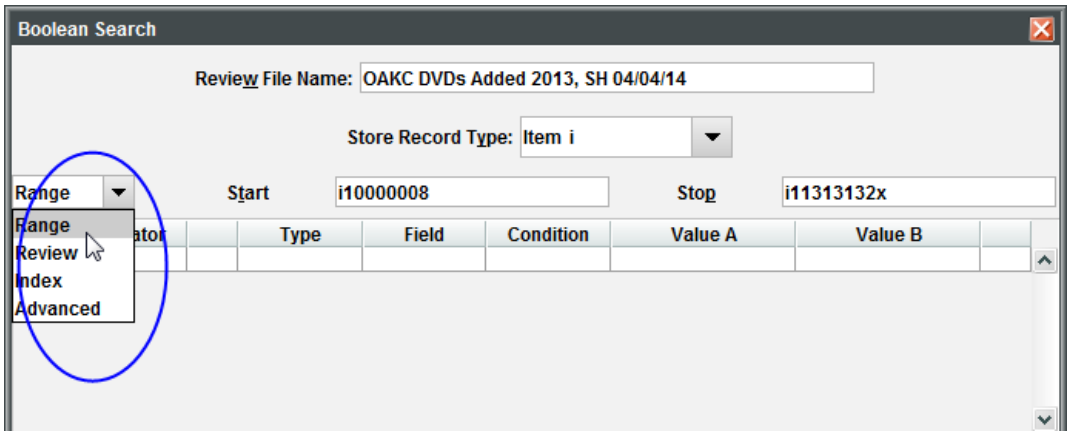


Setting a Range for a Search

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

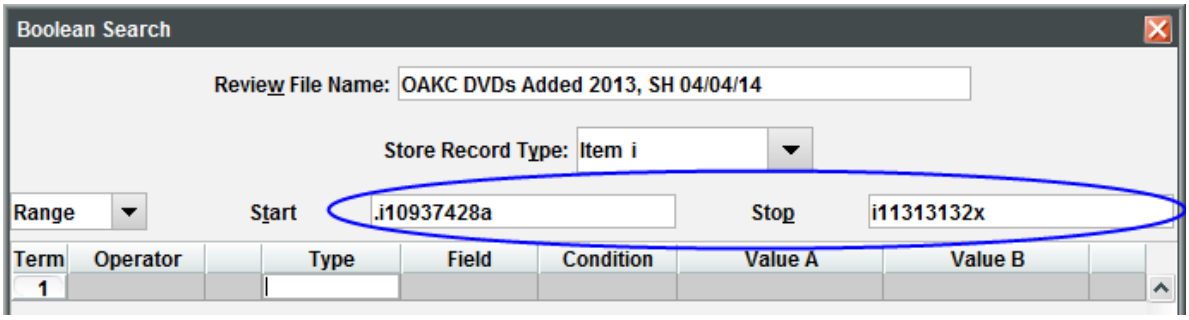
1. In the **pull-down menu**, specify the **range**, **review** file, **index**, or **advanced** keyword(s) to search. Click the drop-down arrow to see your choices (or hit the down arrow key on your keyboard).

2. Choose the one you want to use by clicking on its name.



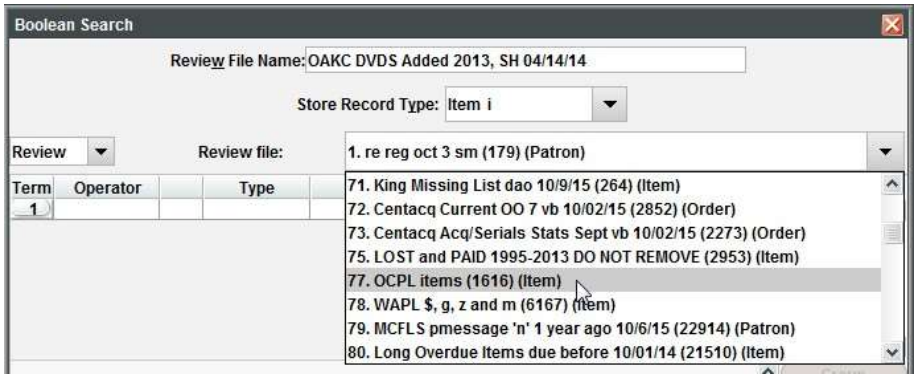
A) Range

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.

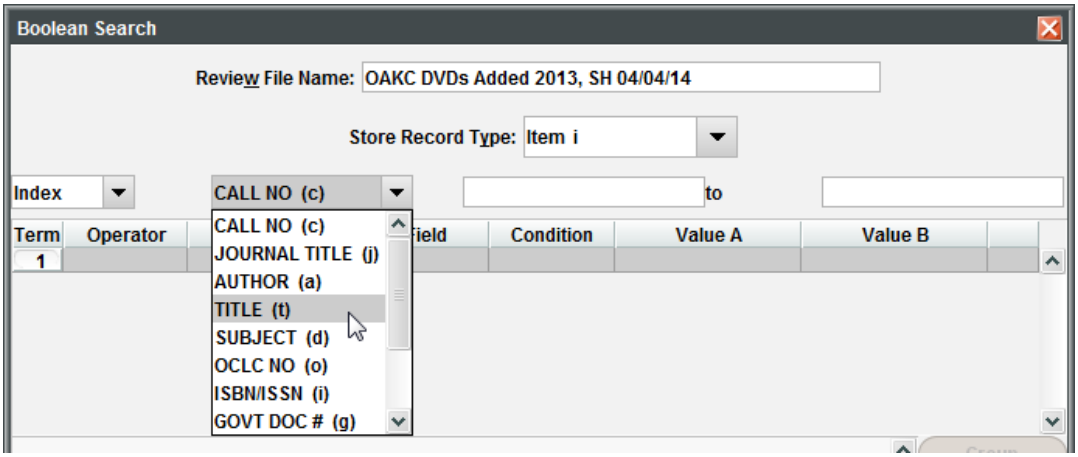


B) Review

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

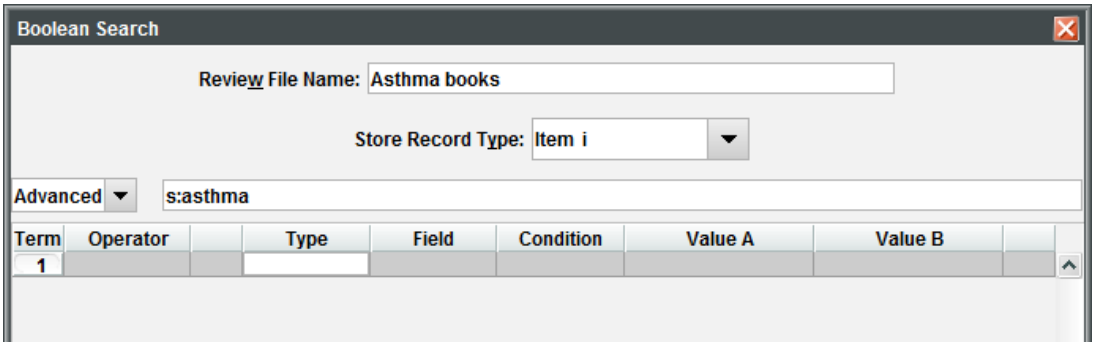


C) Index
Search by author, title, call number, etc. Note that the drop-down menu for index choices varies depending on what record type you are searching. This screen shot shows the indices available for Item Records.



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.

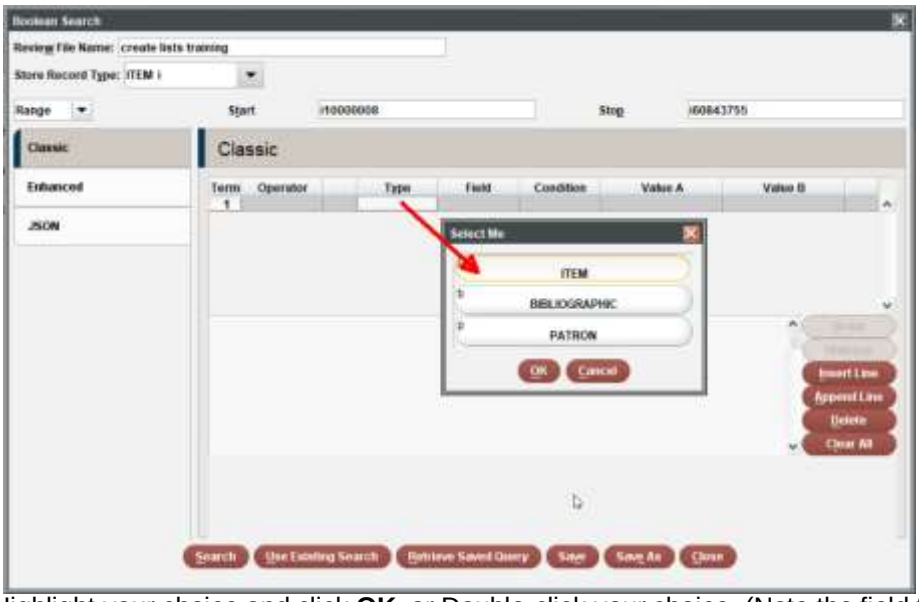


Create a Search String
Here's where you build your search string, using fields of the type of record that you are searching, as well as fields of records that are attached to those records (see Appendix A. The Law of One Hop) for more information). This will help the system pull those particular records 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:

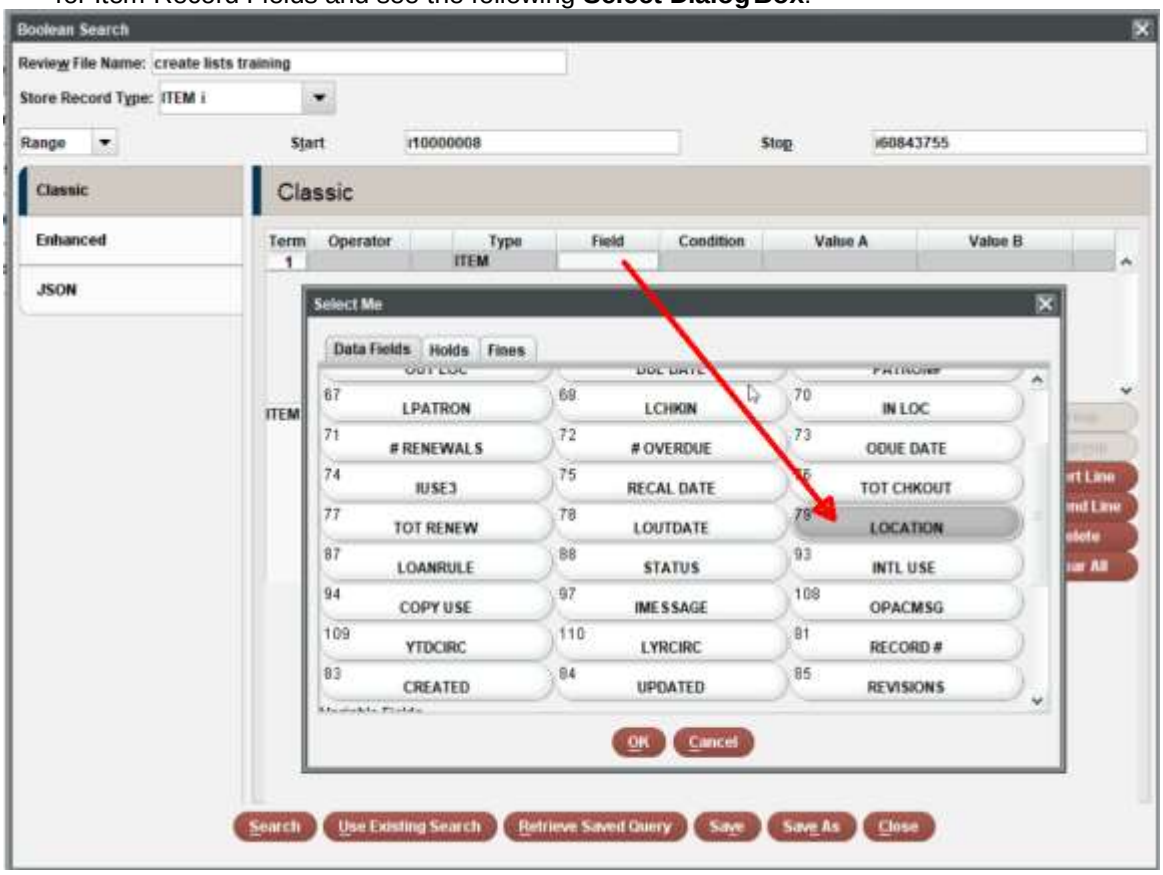


3. Highlight your choice and click **OK**, or Double-click your choice. (Note the field tag displays in the top left corner of the choice boxes).

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**:

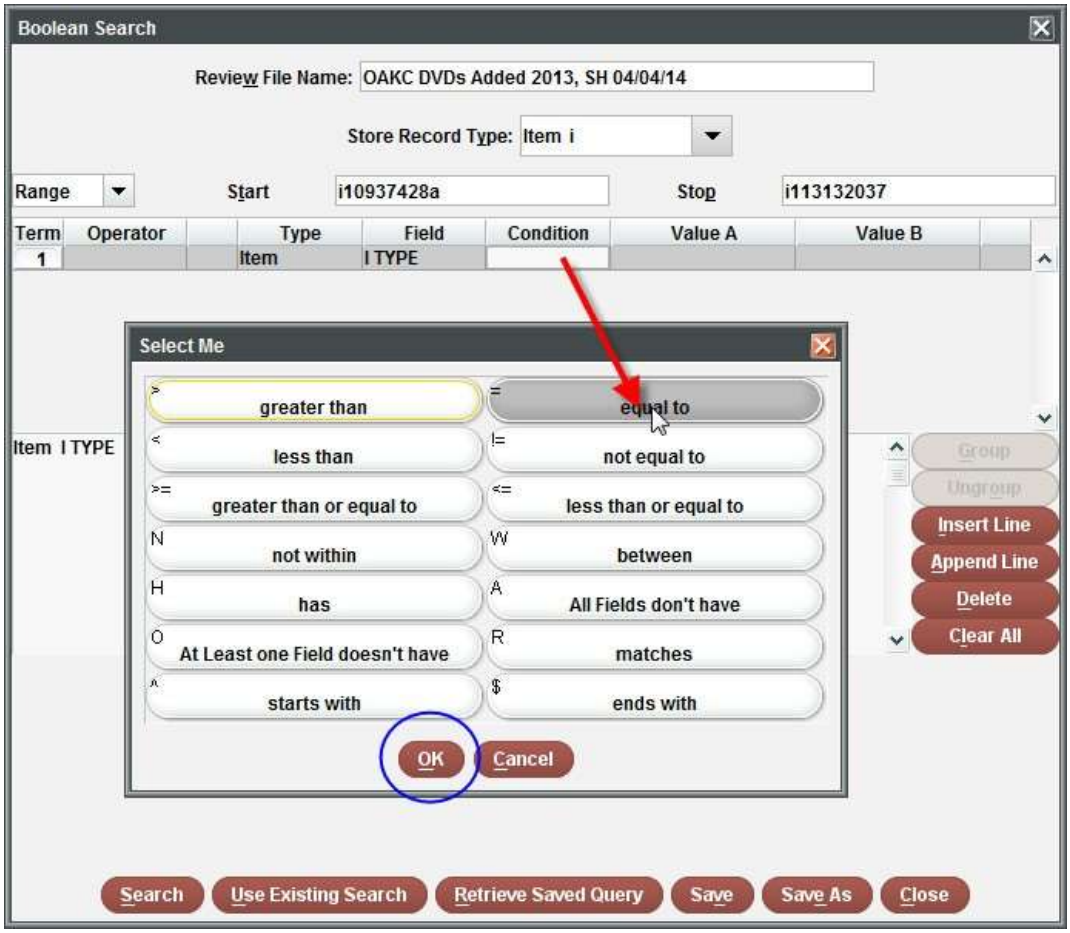


6. Highlight the field you want and click **OK**, or Double-click your choice. (Note the field tag displays in the top left corner of the choice boxes)

   In our example, we want to make a list of items in Location mjju, 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).



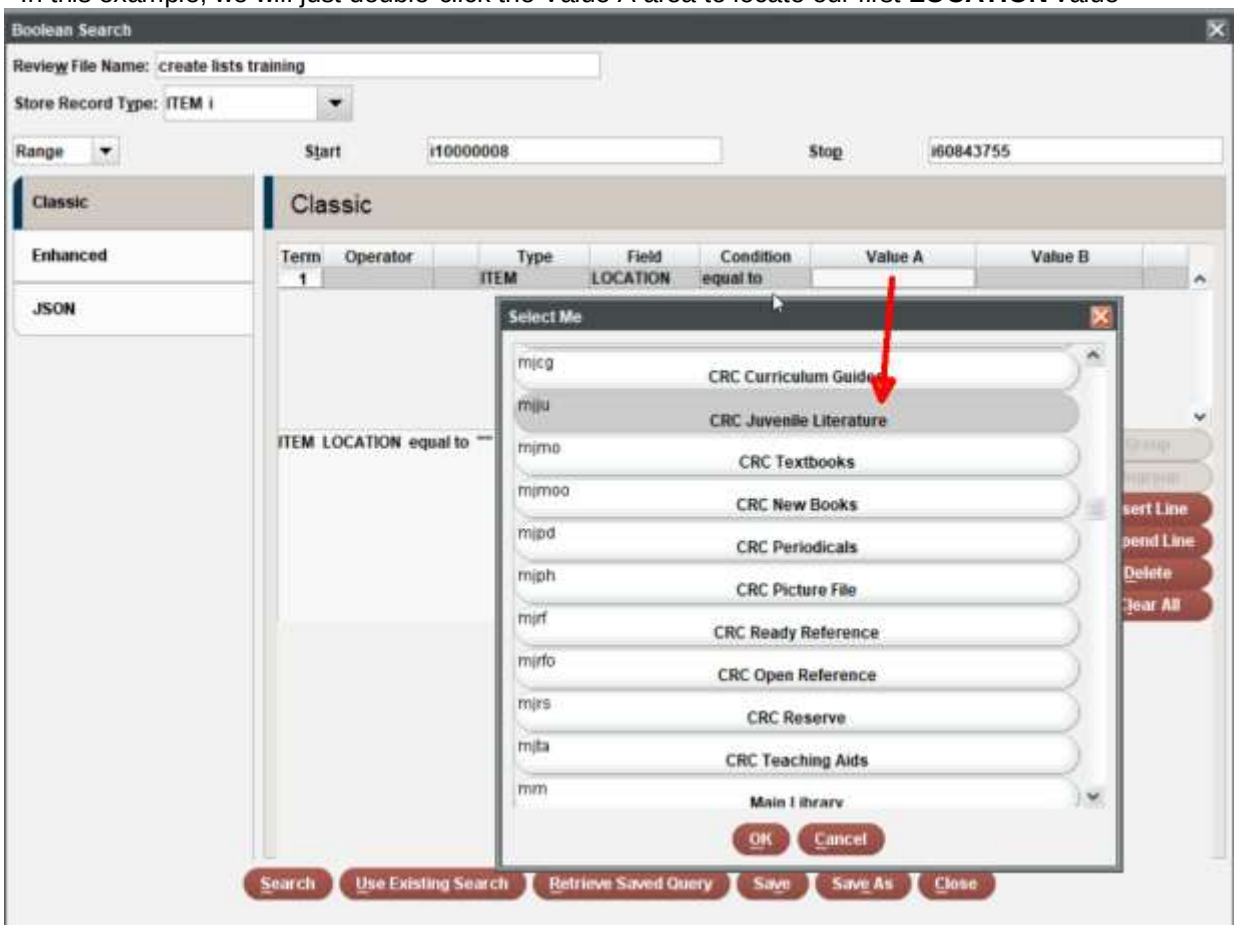
8. Highlight the condition you want to use and click **OK**, or Double-click the condition you want to use. (Note the field tag displays in the top left corner of the choice boxes)

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



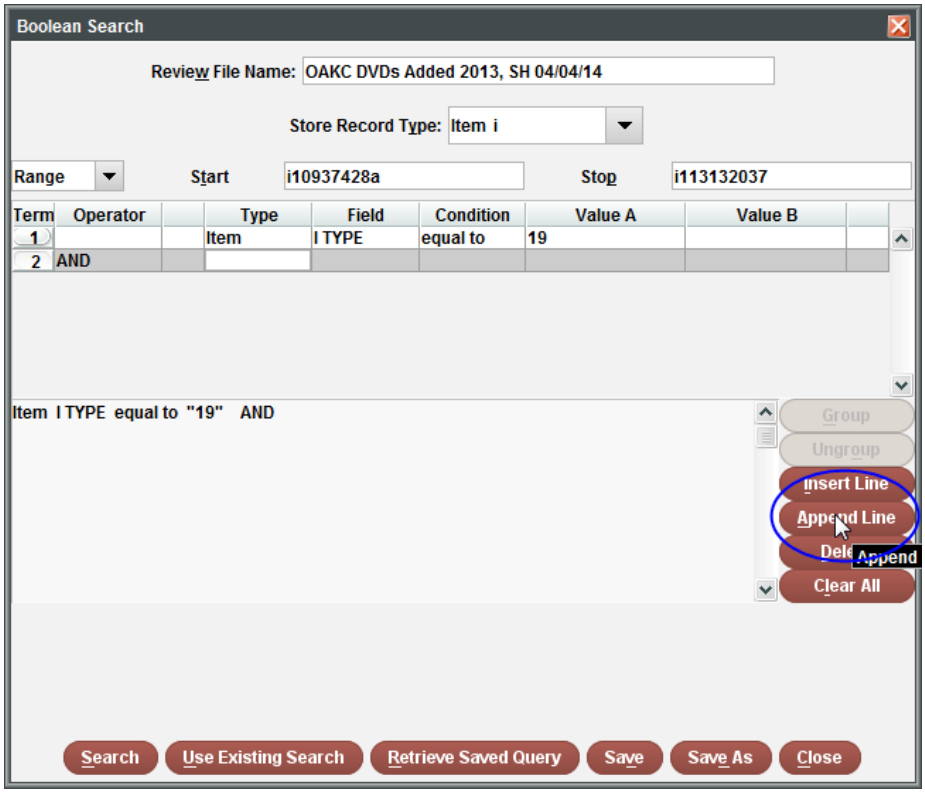
If you chose the "between" or "not within" condition, you must enter a second value in the **Value B** cell.

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.

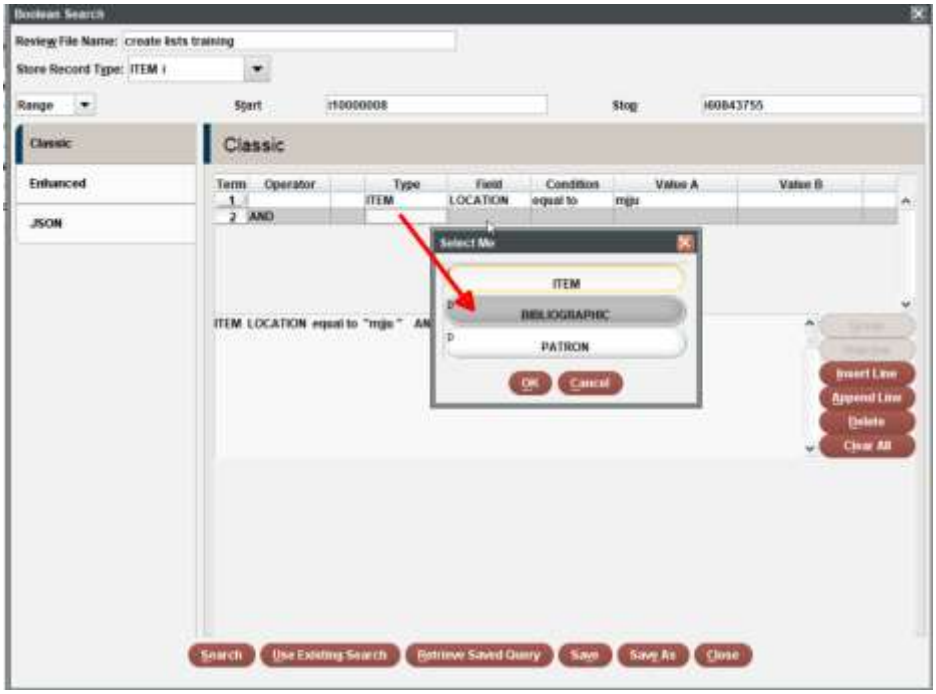


3. In the Operator cell of the new search term, choose "and" or "or" by double-clicking. The cell's Operator defaults to "and." You may also type the “a” or “o” into the cell.

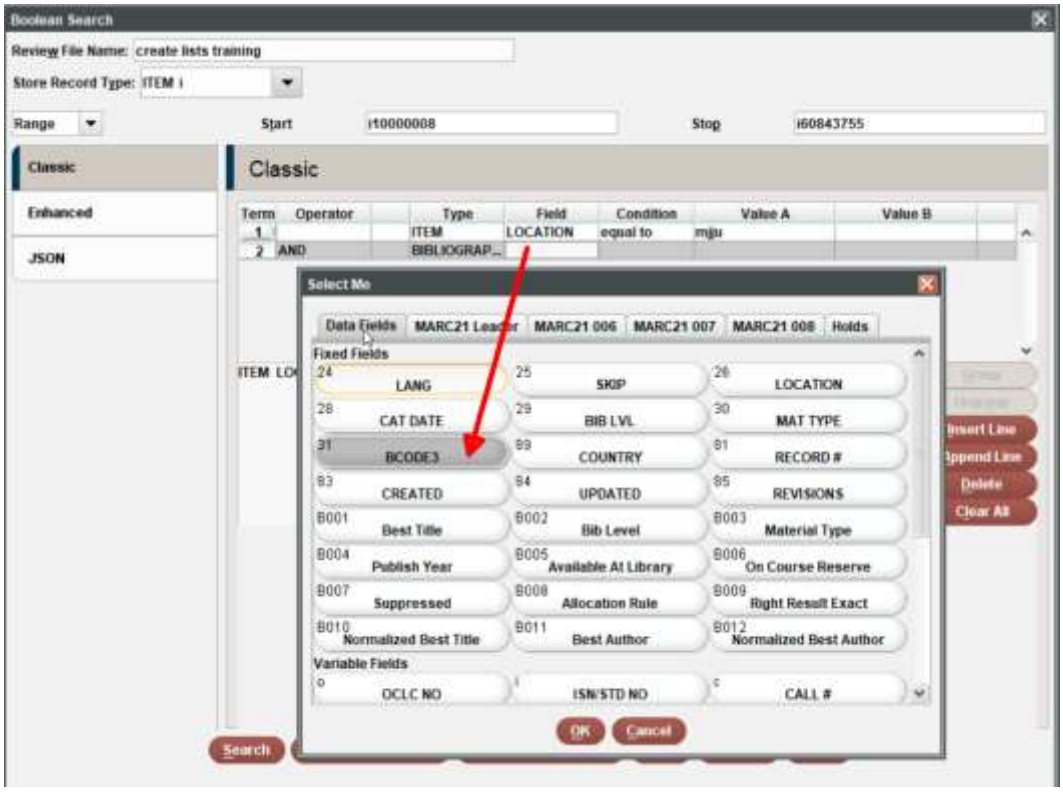
4. Specify the criteria for the new search term.

5. 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**.

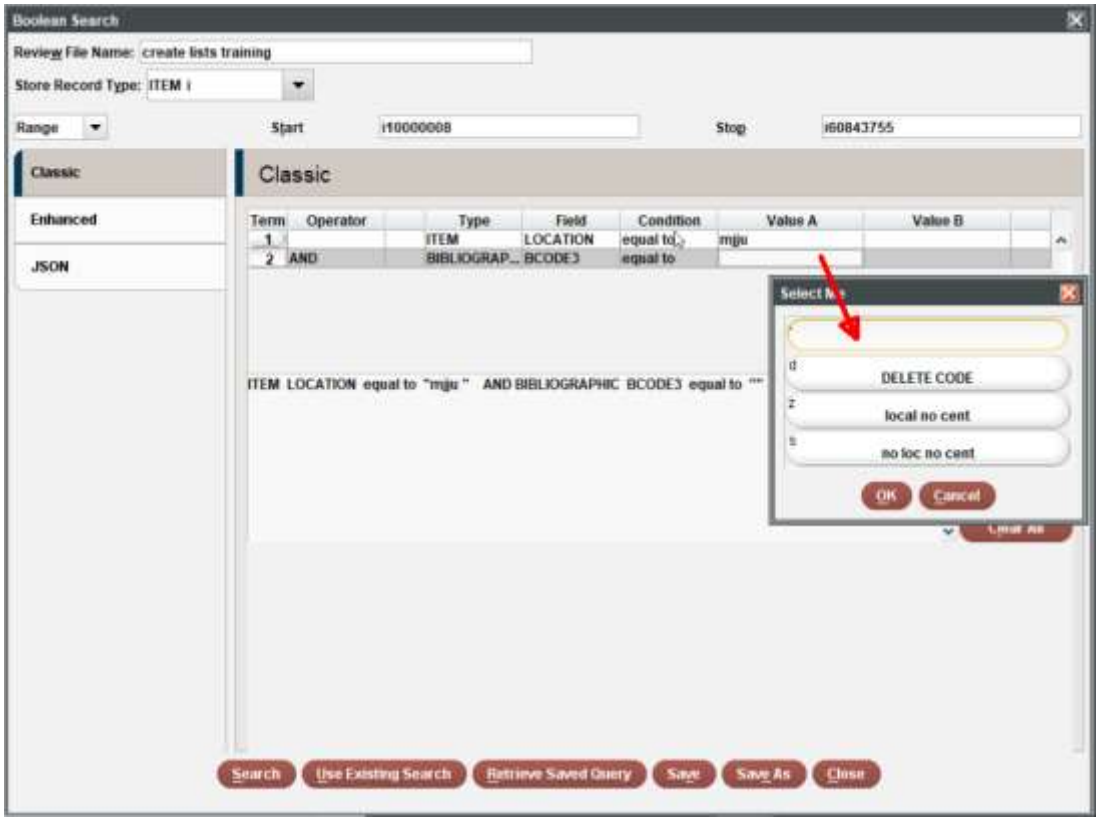
Limit to Bibliographic records that can be viewed by the public.
Bcode3 determines if a record displays to public



2) Click on BCODE3, and OK

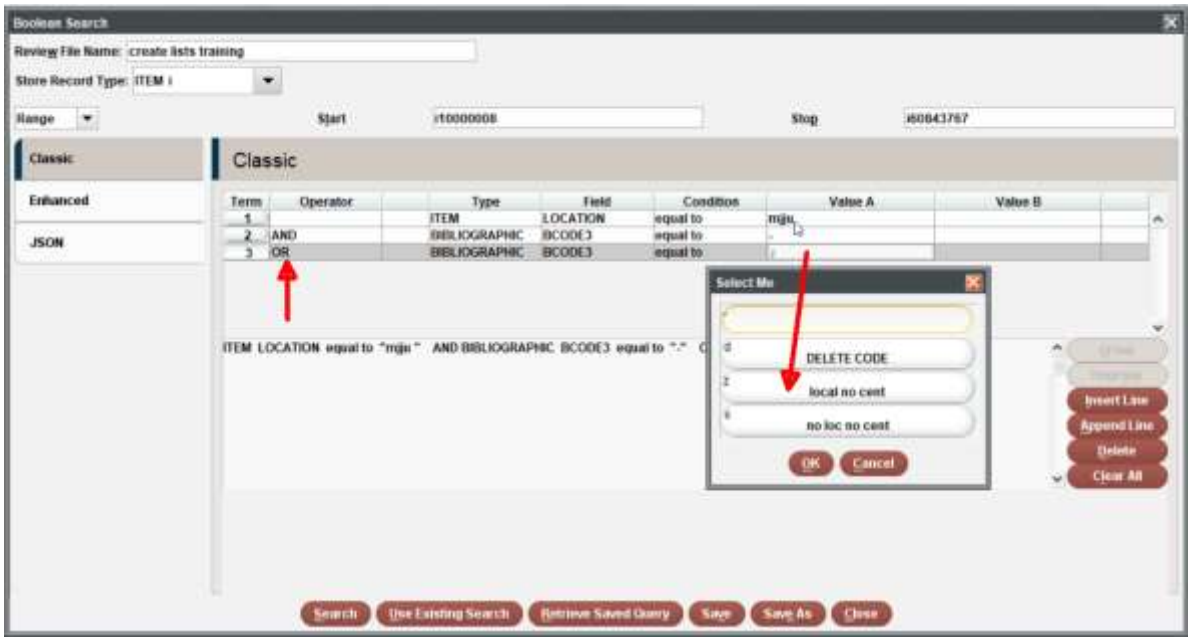


3) Choose = to and then bcode3= -

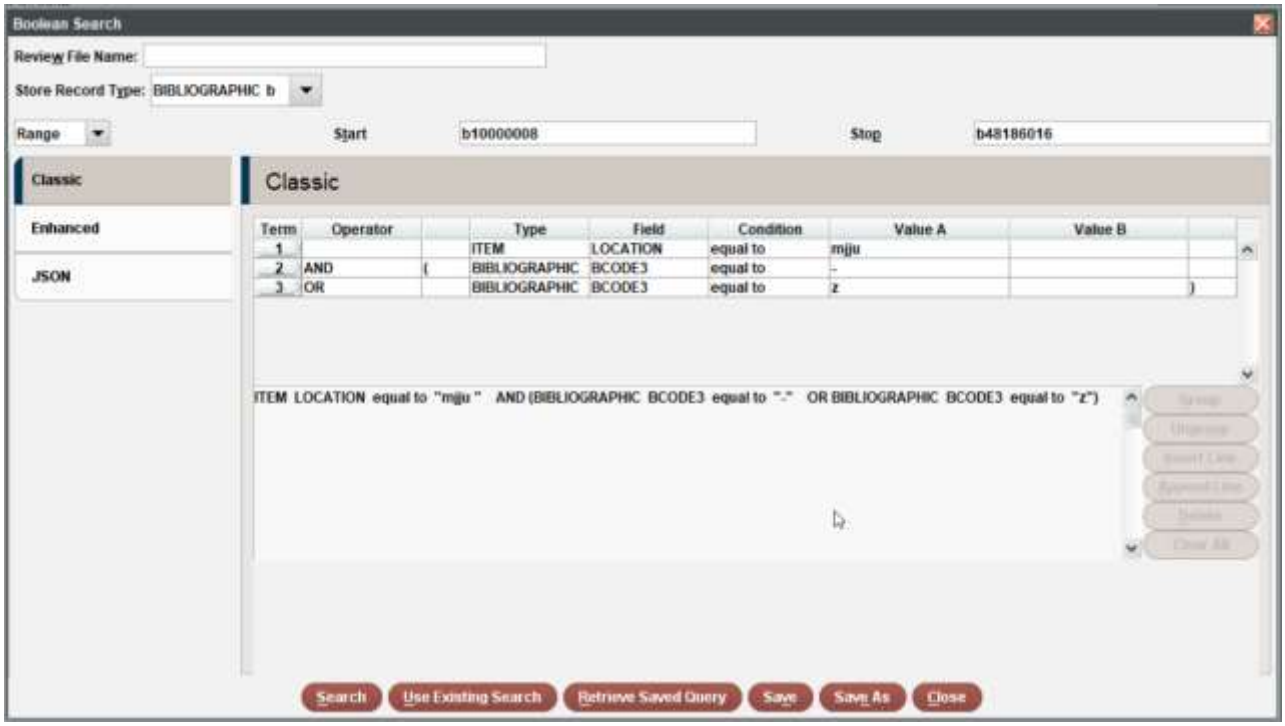


4) Append another line and add bcode3 = z local no cent

On the Operator Field make sure to pick OR

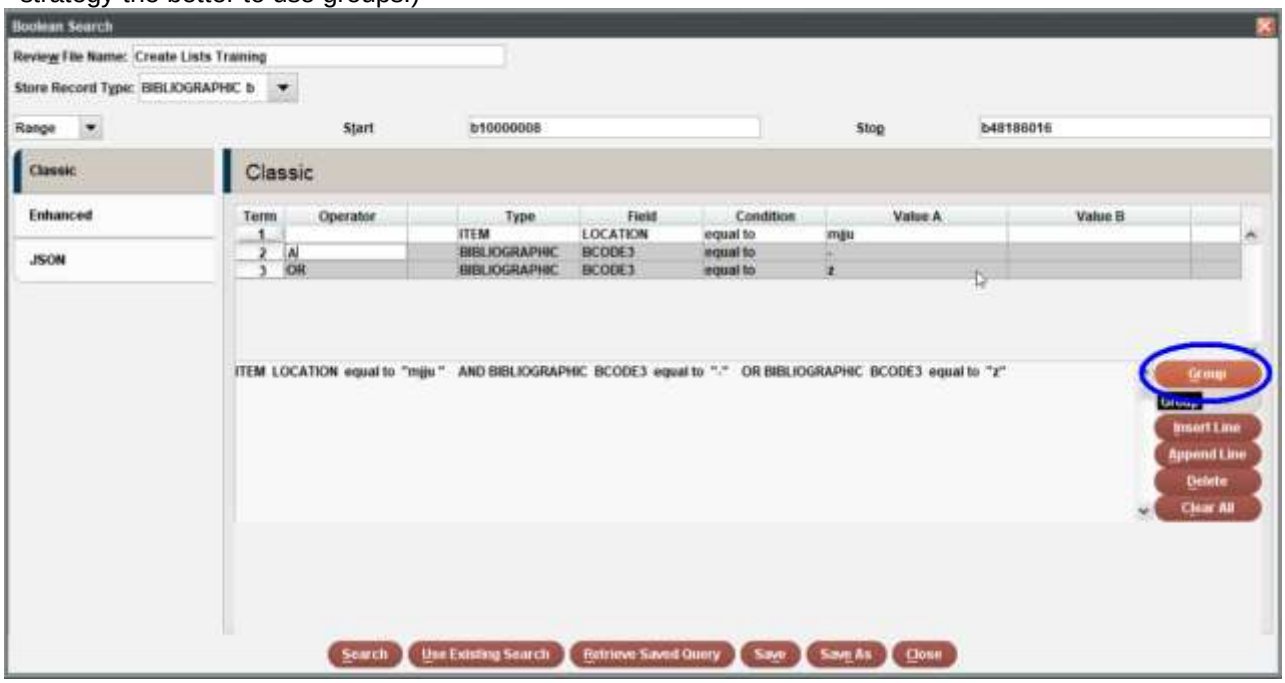


5) Final Search for all CRC juvenile literature looks like below. See next section to Group

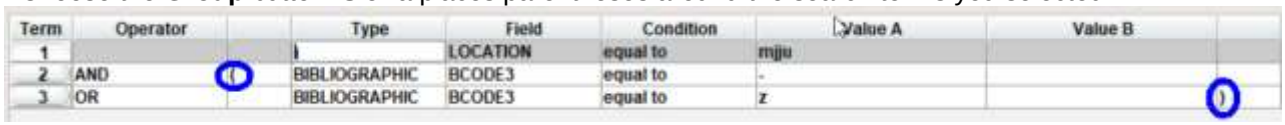

Boolean Search
Review File Name:
Store Record Type: BIBLIOGRAPHIC b
Range
Start
b10000008
Stop
b48186016
Classic
Enhanced
JSON
Classic
Term Operator Type Field Condition Value A Value B
1 ITEM LOCATION equal to mju
2 AND (BIBLIOGRAPHIC BCODE3 equal to -
3 OR BIBLIOGRAPHIC BCODE3 equal to z)
ITEM LOCATION equal to "mju " AND (BIBLIOGRAPHIC BCODE3 equal to "-" OR BIBLIOGRAPHIC BCODE3 equal to "z")
Search
Use Existing Search
Retrieve Saved Query
Save
Save As
Close

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.)

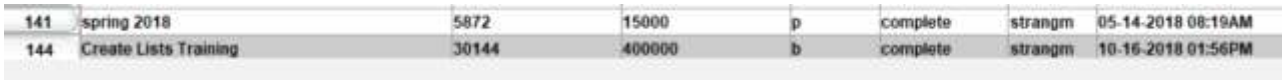


Choose the **Group** button. Sierra places parentheses around the search terms you selected.



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

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



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.

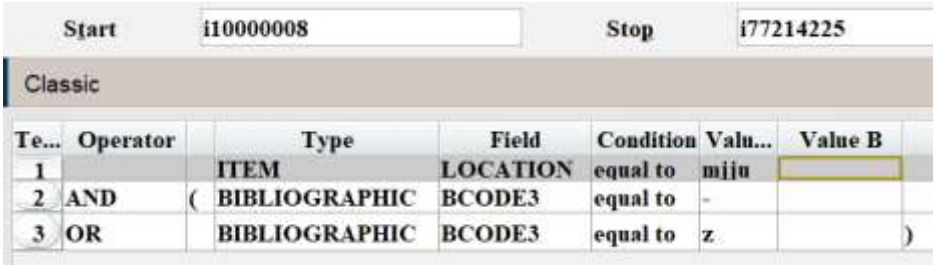
2. Choose the **Delete** button to remove the selected row(s), or choose the **Clear All** button to remove all search terms for the current search (you do not need to select the rows when clearing all).

Modify and re-run an existing search

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

2. Click the Edit existing query button

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

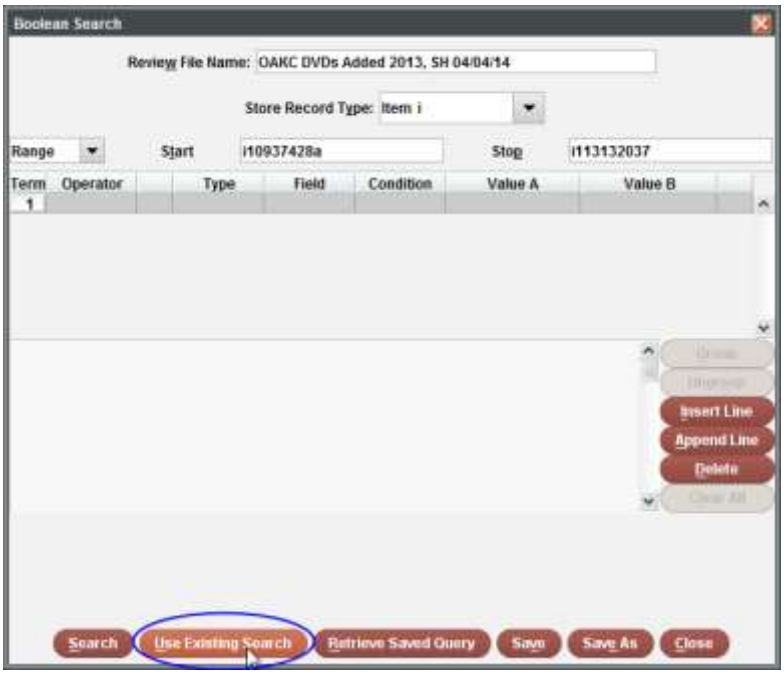


4. Next section examines specifying search criteria

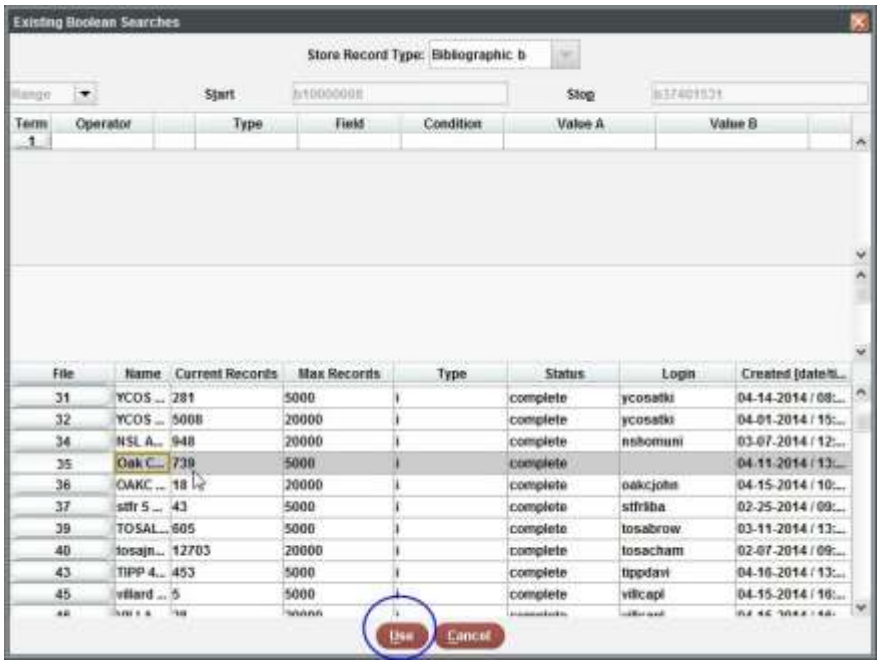
Use Existing Search

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.

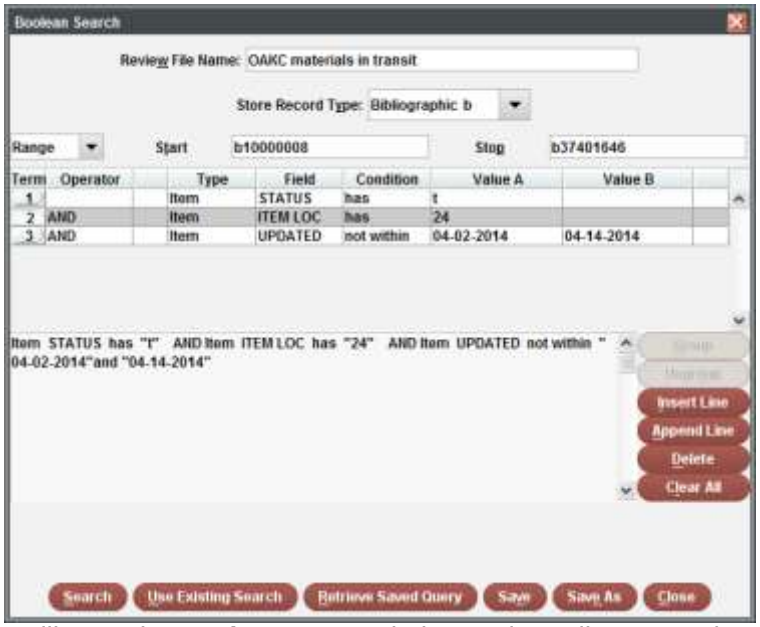


3. This will open up the **Existing Boolean Searches** window. Select a line to see the details of the search string in the top half of the window.
4. Click the **Use** button to incorporate the strategy into your new search.
5. Add more search terms, or begin your search by choosing Search.
   Here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

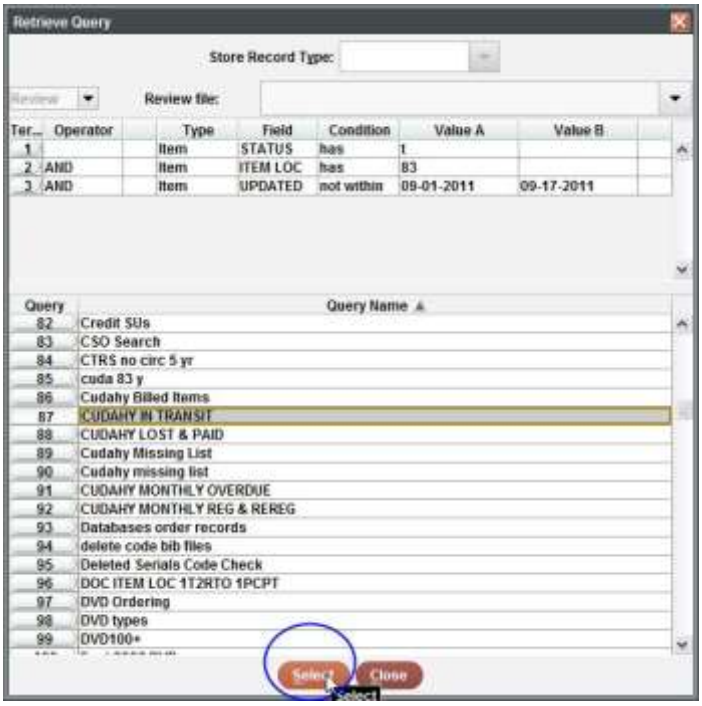


Retrieve Saved Query
You can incorporate a previously saved search when you specify your search criteria (see Saving Searches for more information).

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.



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.



4.

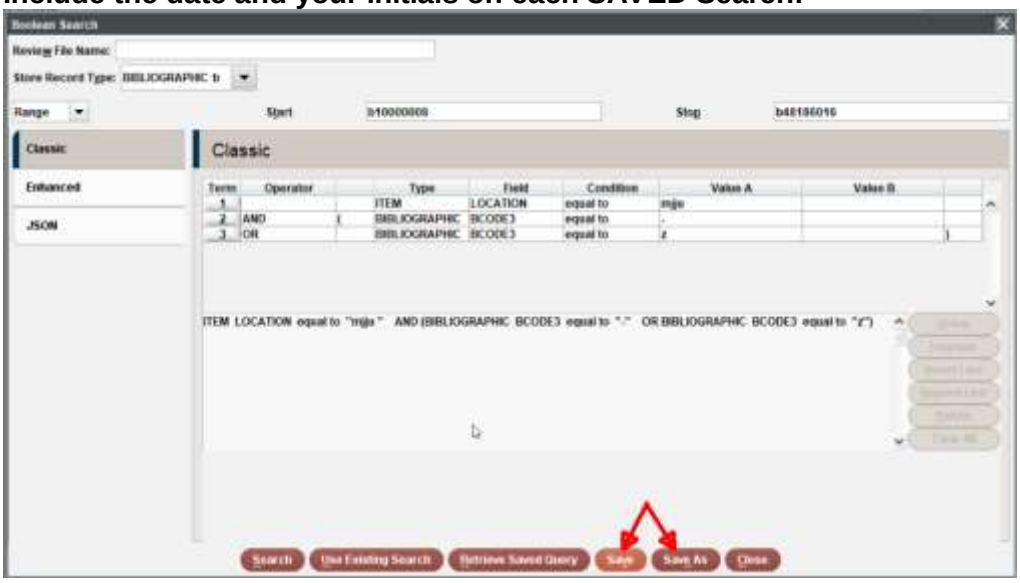
5. Click the **Select** button to incorporate the strategy into your new search.

6. Add more search terms, or begin your search by choosing **Search**.
Here is the final search string for our example:

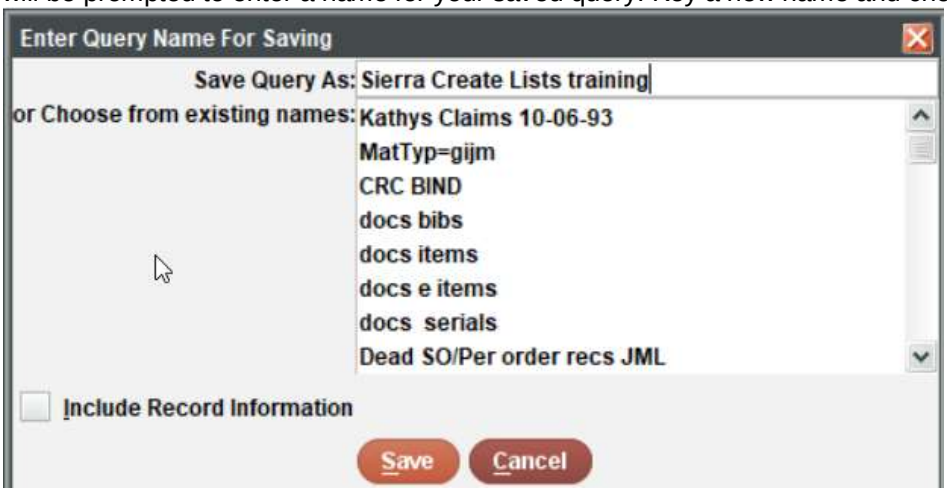
Saving the Current Search Strategy

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:

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



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



2. 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.

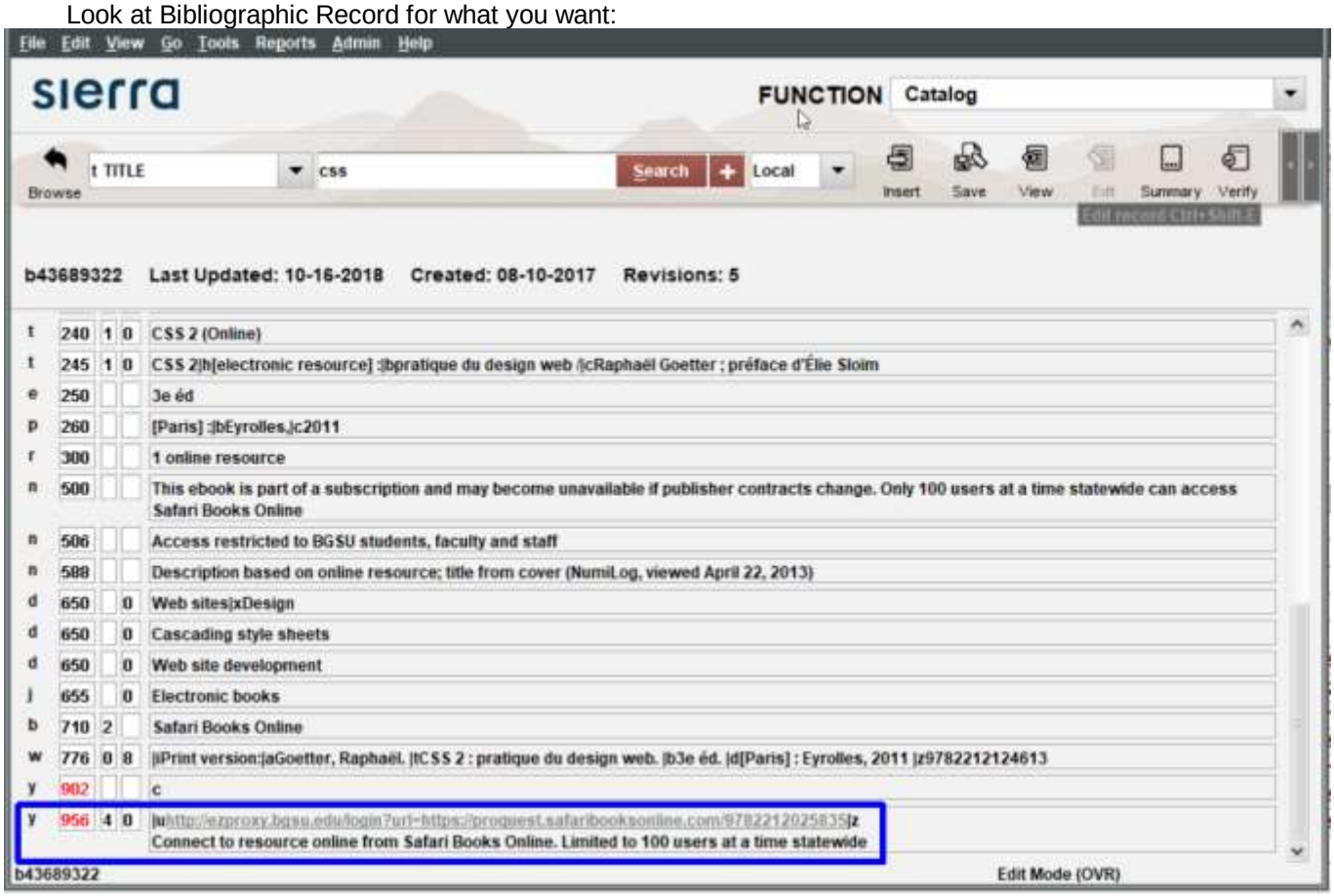
Stopping Your Search

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:



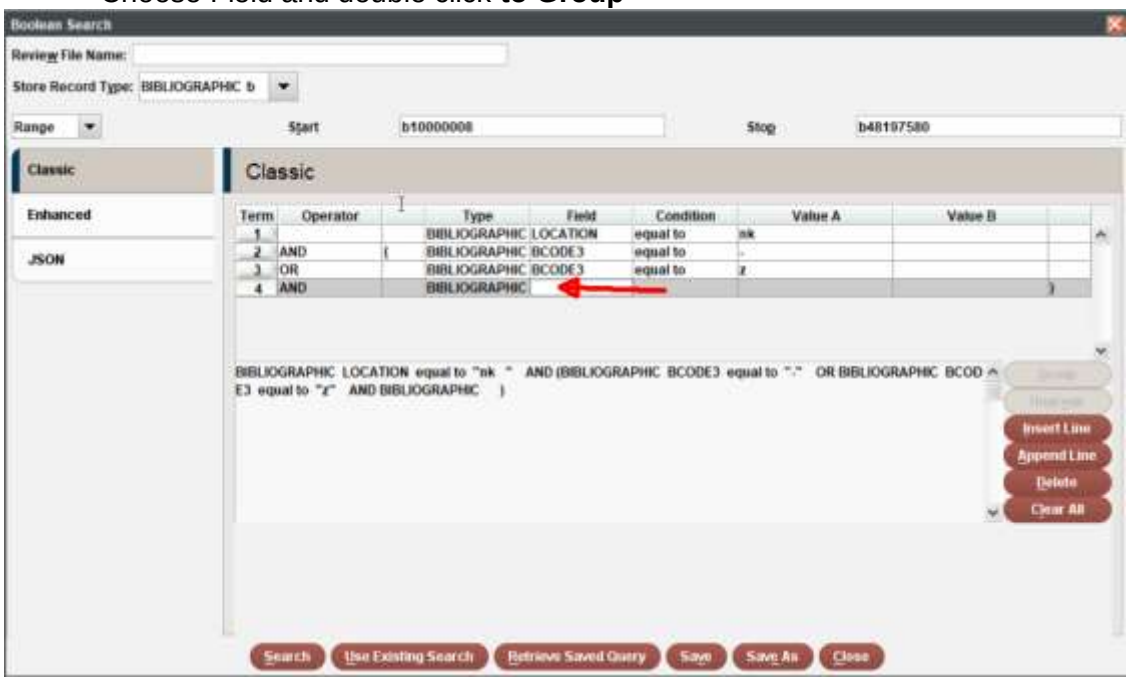
Choose review file and enter search terms

Bibliographic Location = nk

And **Bibliographic b**code3 = -

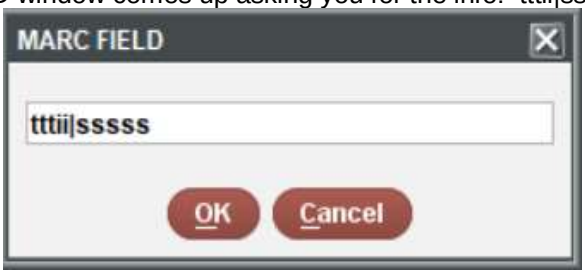
Or Bibliographic bcode3 = z

Choose Field and double click **to Group**



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

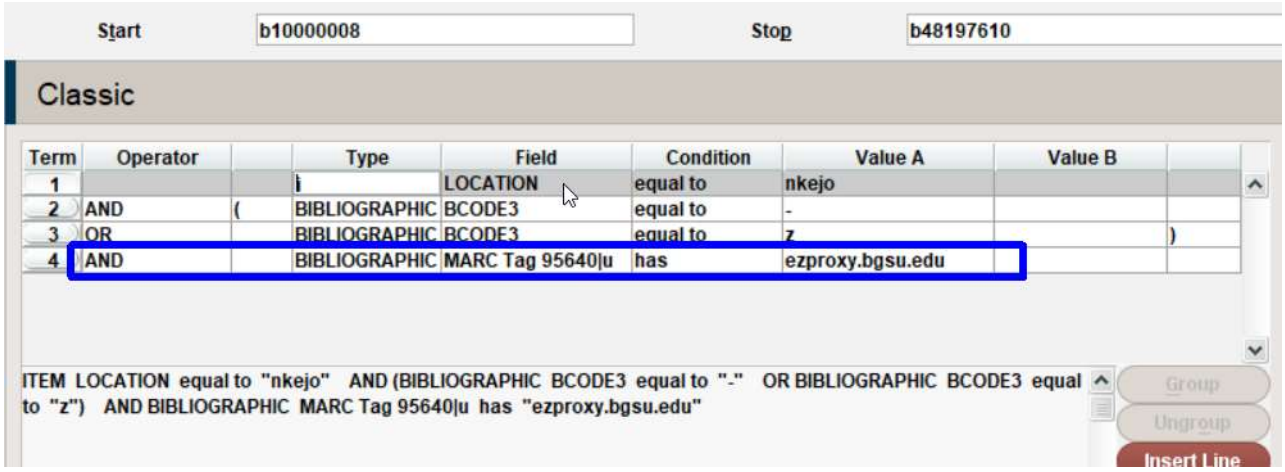


d) Enter Marc 95640|u record information

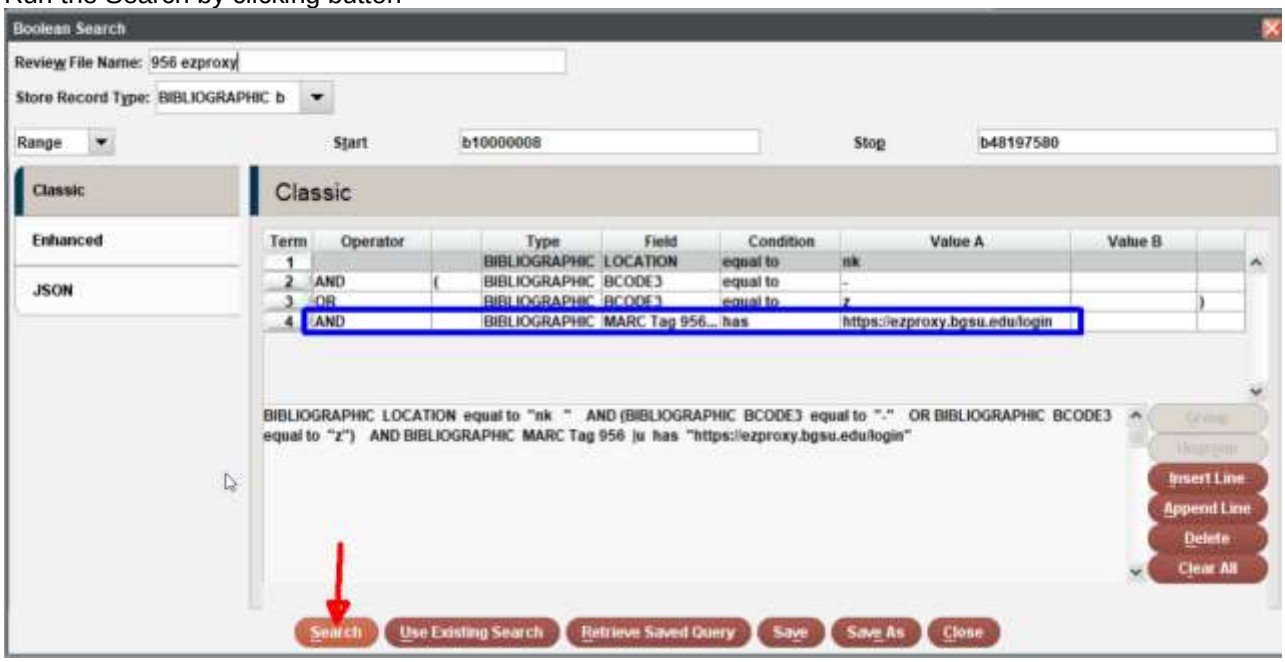
e) Enter the has and then the text you want: “ezproxy.bgsu.edu”

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:



g) Run the Search by clicking button



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!

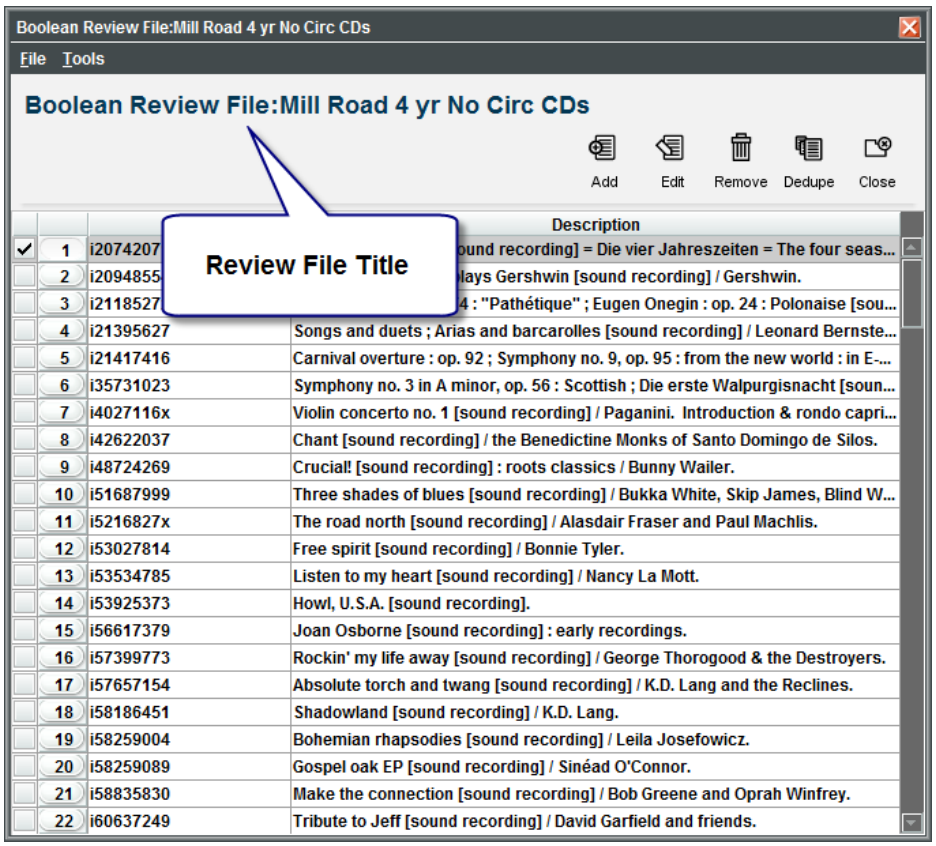
Show Records in a Review File

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).

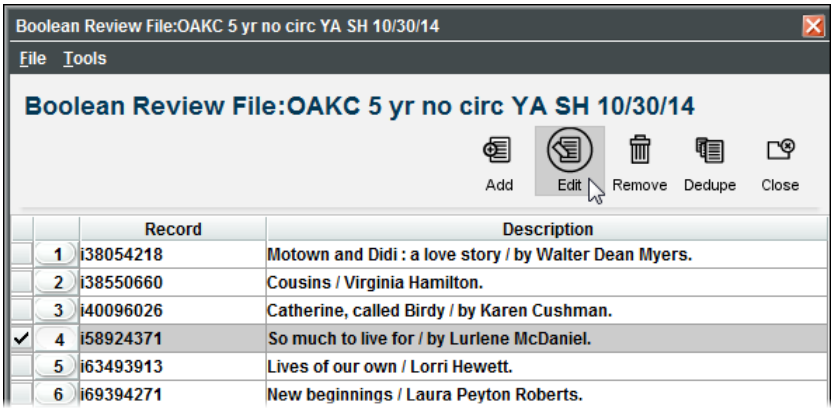


4. From this window, you can do many things. You can view or edit the records. You may also add and remove records from the list. Basically, anything you have authorization to do within a record, you can do from this window. Maybe you want to add e-mail addresses to patron records with no e-mail. Working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

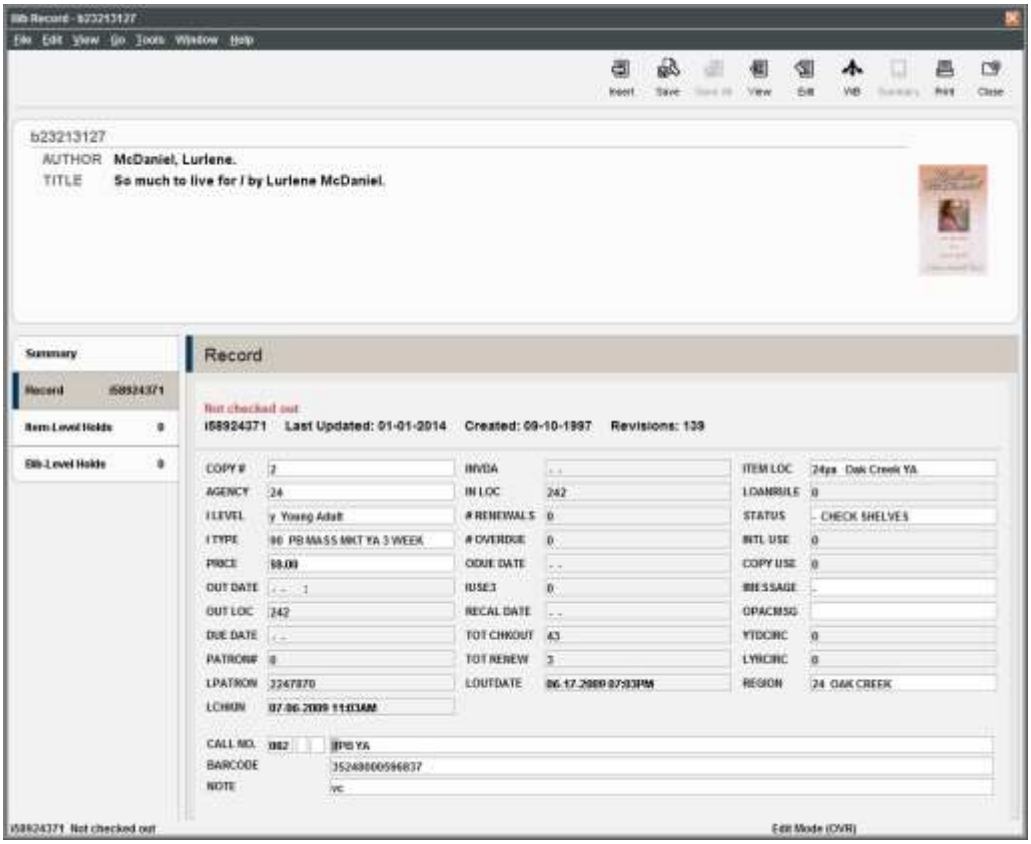
Editing the Records in a Review File
From your list of records, you can edit (or just view) records.

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.



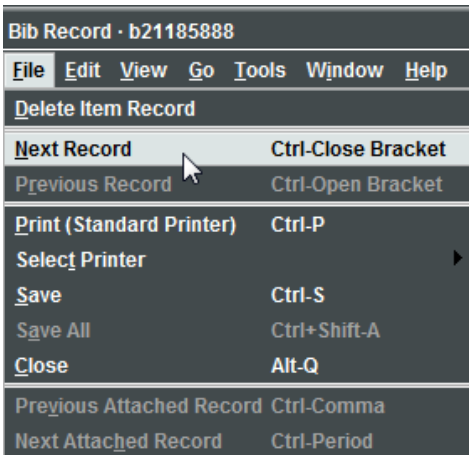
Here you can do any editing function, add an e-mail address, change a phone number, correct the data in a fixed-length field, etc.

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.



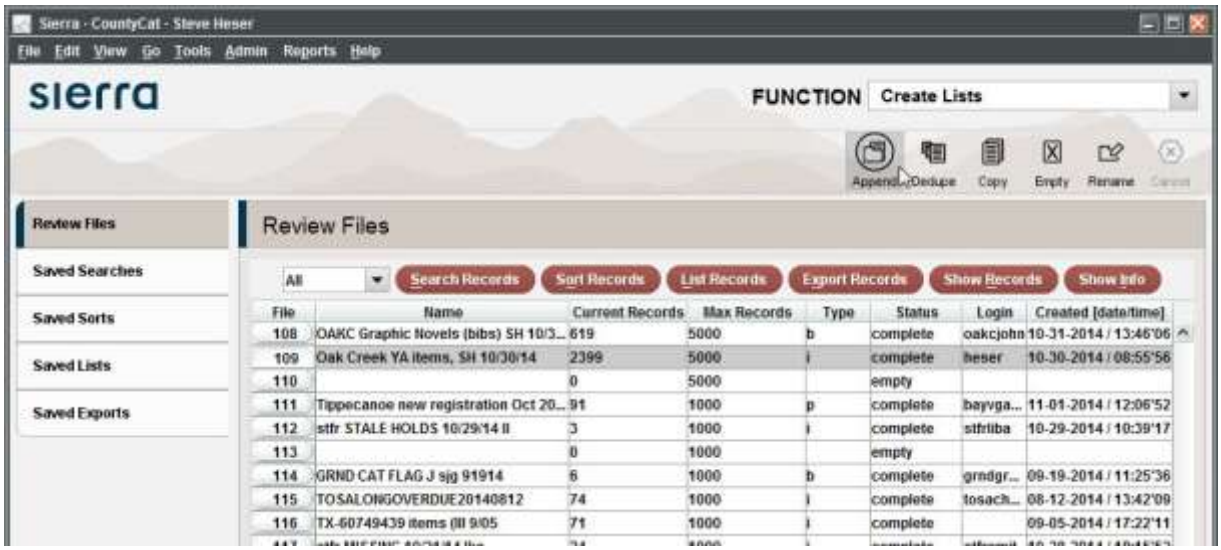
4.

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.

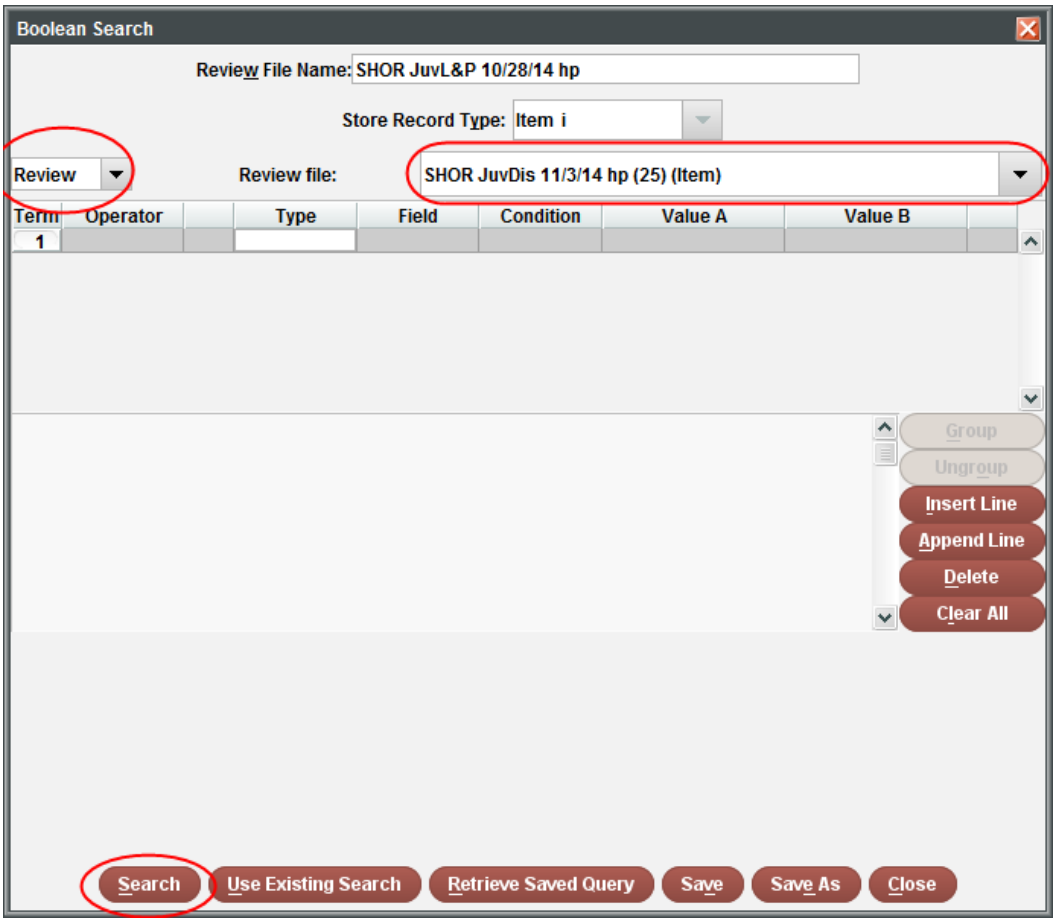


3. Sierra displays the Boolean Search window.
4. You can change the name for the review file by entering a new name.
5. Enter your search criteria (see Specifying Search Criteria for more information).
6. Choose Search to begin searching.
7. The new records will appear in your list.
8. You can also append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

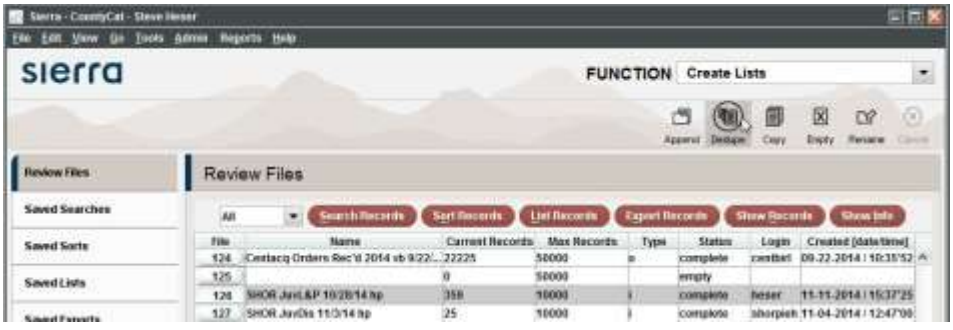
Merging Review Files

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.

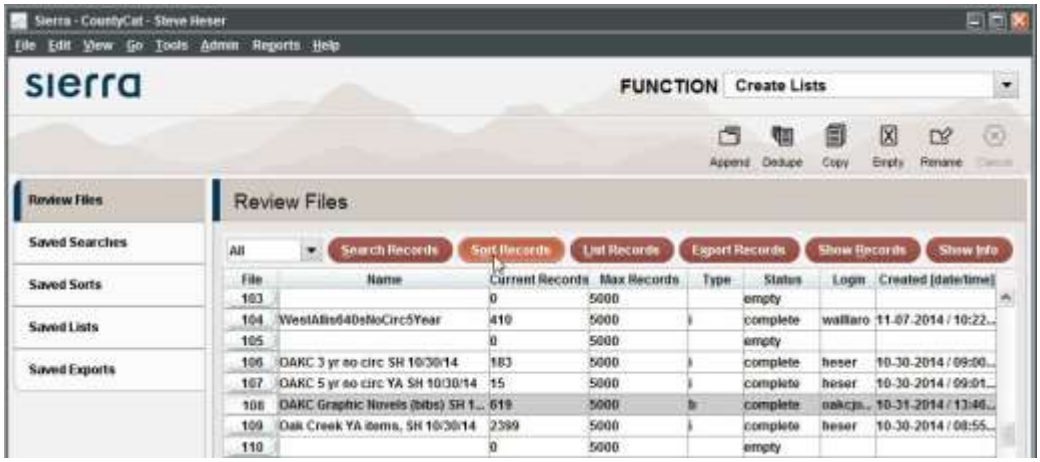


Sorting Records in a Review File

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©.

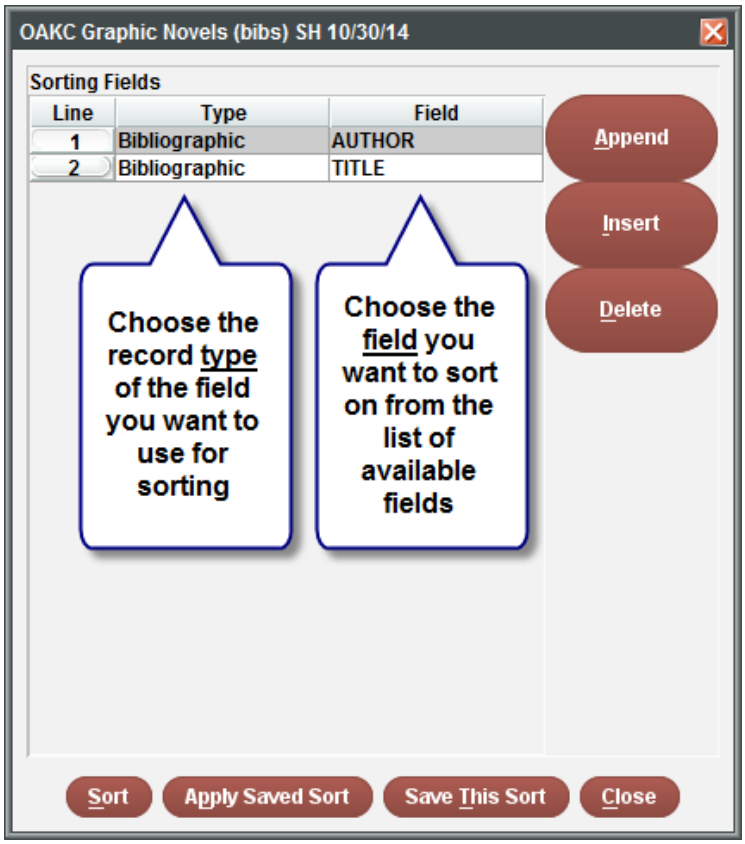
Deleting Sort Criteria

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

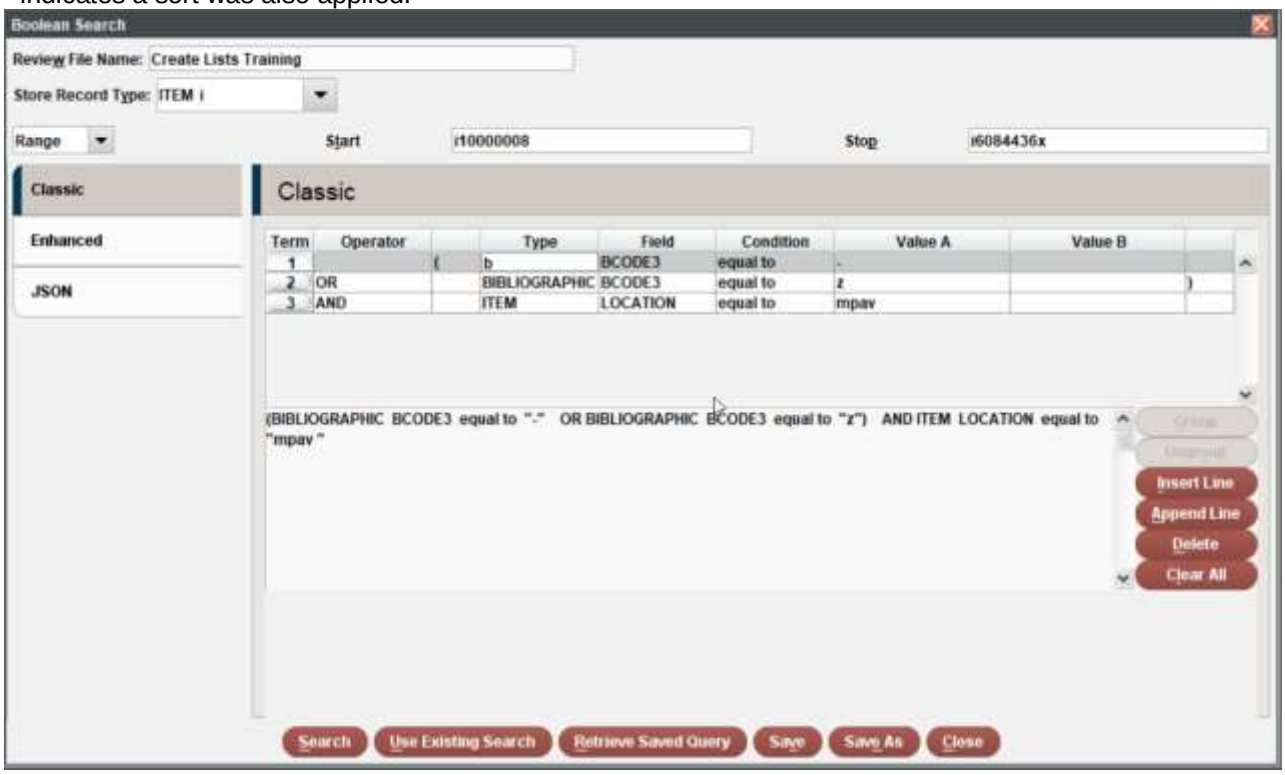
Once you have created and sorted your list, you can work with the list within Sierra using **Show Records**, or you can take the information from your list outside of Sierra. You are limited in **Show Records** to only seeing the record number and description. It is necessary to look at individual records 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.

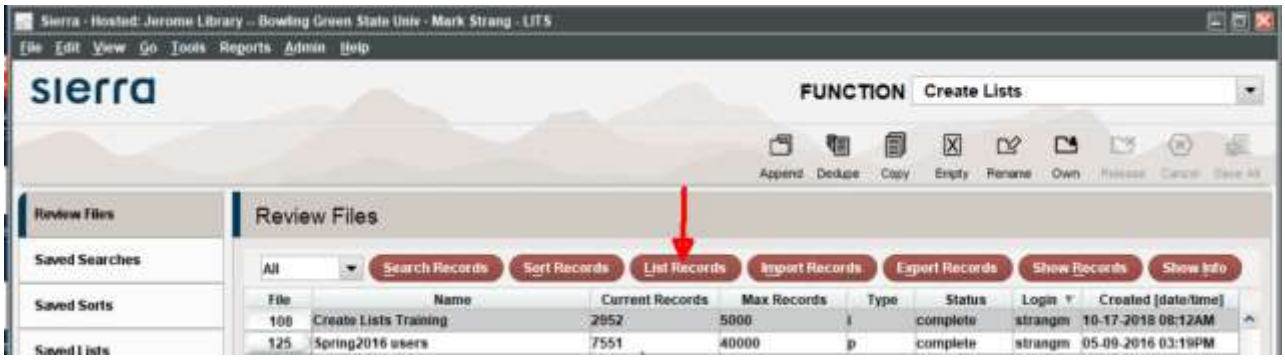
In the following example, a review file was created that lists all of the Pop Culture Library DVD's. Here is the search string that was used to create the list. Note that the bottom of the **Show Info** window indicates a sort was also applied.



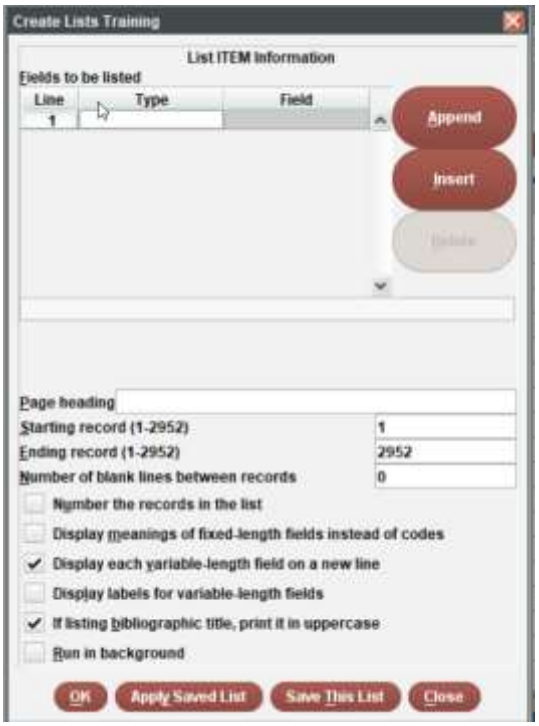
To list and print selected fields from the records in a review file:

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.

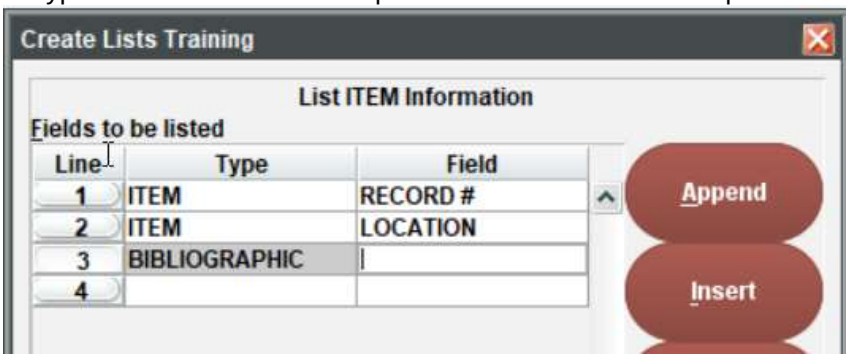
5. Double-click in the **Field** cell and choose a field from the pop-up window.

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.

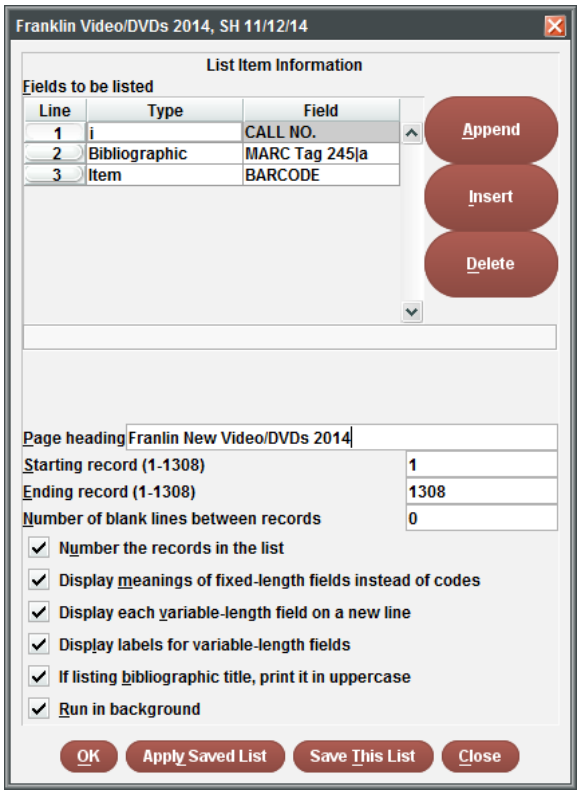
Display meanings of fixed-length fields instead of codes
Select this check box to display the meaning of fixed-length fields. If you do not select this check box, codes will be displayed instead.

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.

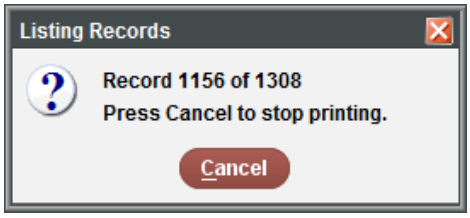
Display labels for variable-length fields
Select this check box to display field labels for all variable-length fields. If you do not select this check box, only the values of the variable-length fields will be listed.

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.

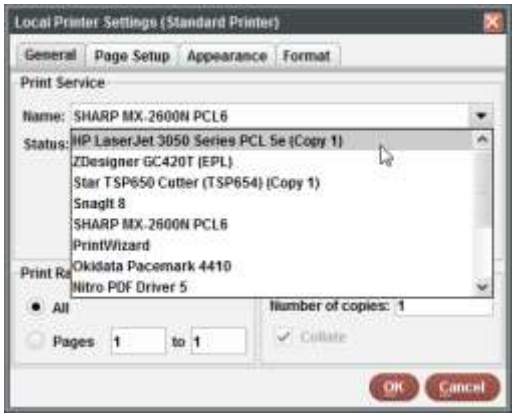
Run in background
Run the listing process in the background and continue other work in Sierra (good for long lists).



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



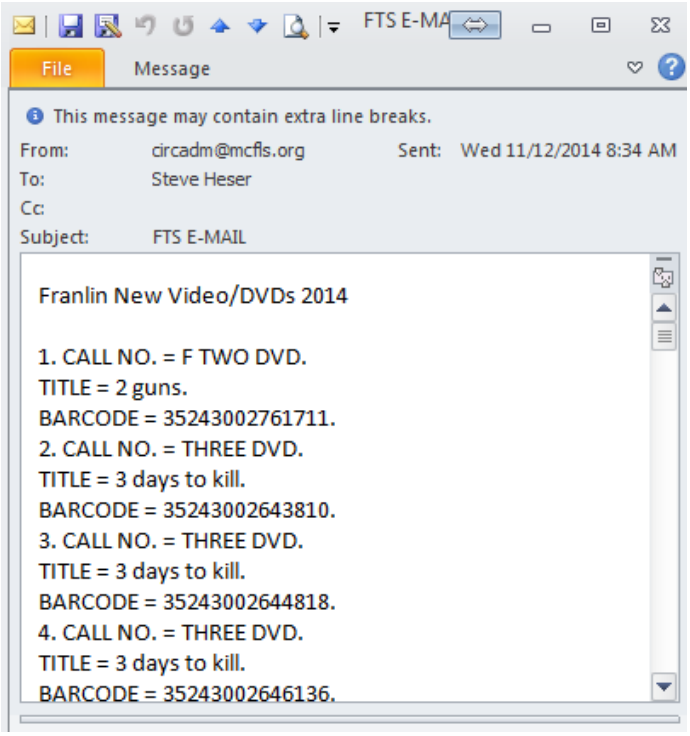
11. If a **Select Printer** dialog appears, select a printer from the list and choose **OK**. This will happen the first time you print a list during your current login session. Each time thereafter, the print jobs will go to the same printer unless you direct them elsewhere.



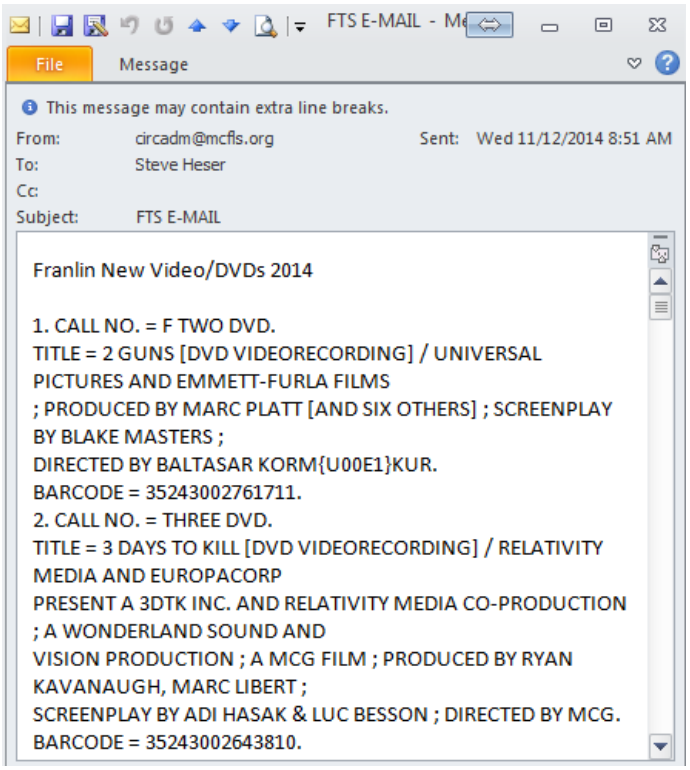
While the review file is being listed, the status in the **Status** column of the **Review Files** tab will say "**listing**," and the buttons located at the top of the Review Files tab will be disabled for the selected review file. When the sort has been completed, the status in the **Status** column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



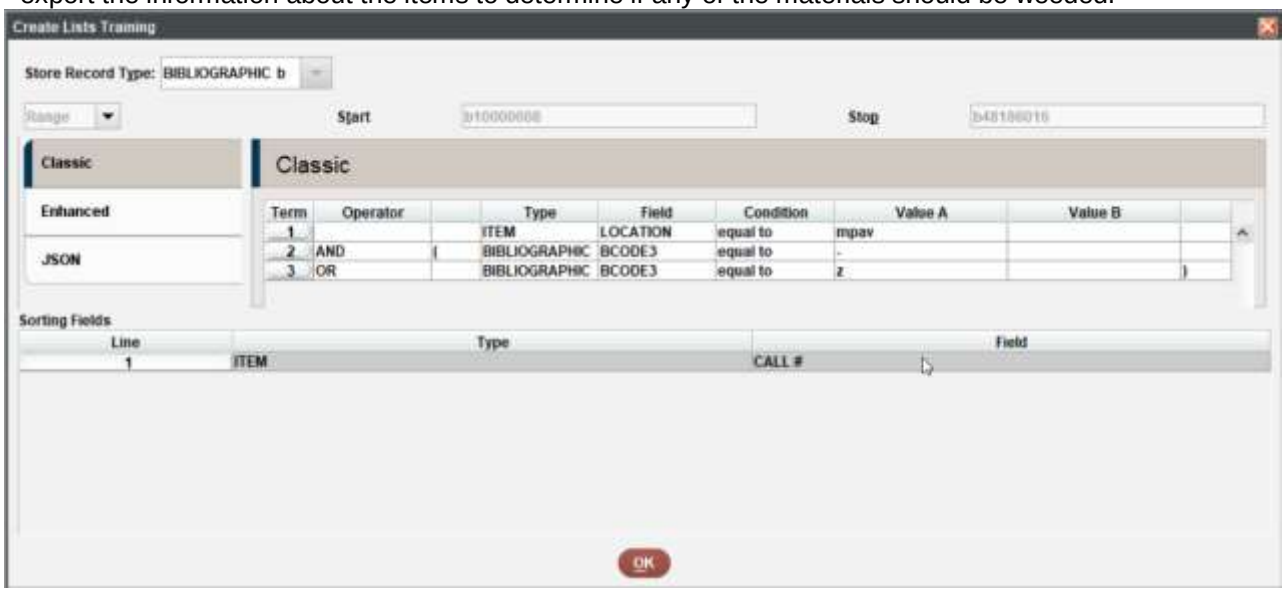
NOTE: If the BIBLIOGRAPHIC TITLE field had been chosen, rather than the BIBLIOGRAPHIC MARC Tag 245|a, this is what your e-mail would look like. The titles are much longer this way:



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.

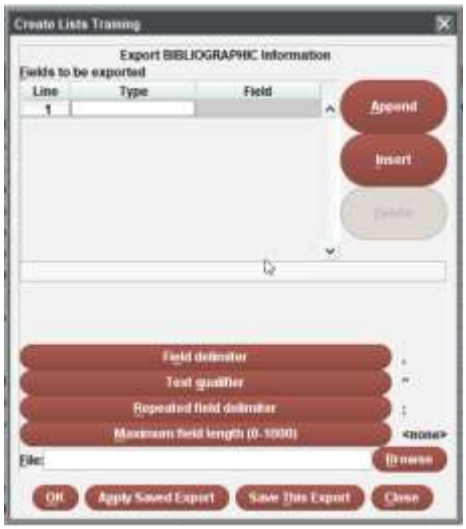


To export selected fields from the records in a review file:

a) Select the row of the review file that contains the data you want to list.
b) You may want to sort by Item Record Call # for convenience sake before exporting
c) 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!**

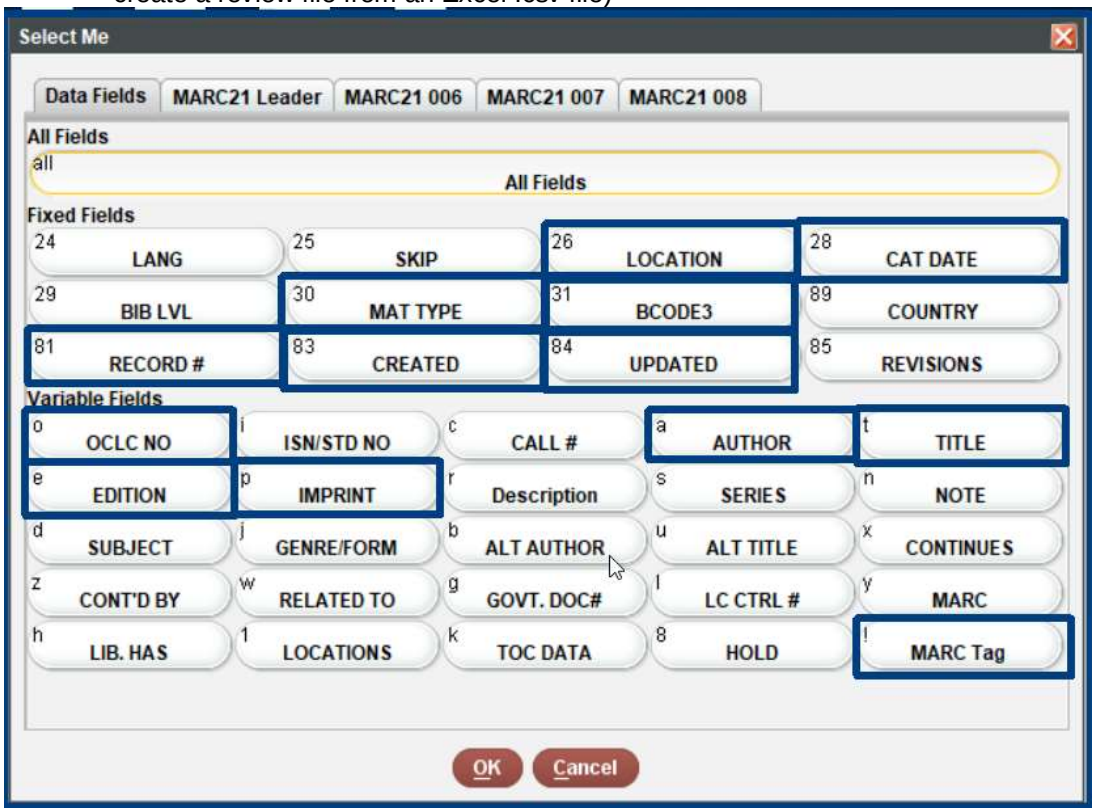
f. (Optional) Remove a field to be listed by selecting its row and choosing the **Delete** button.

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)



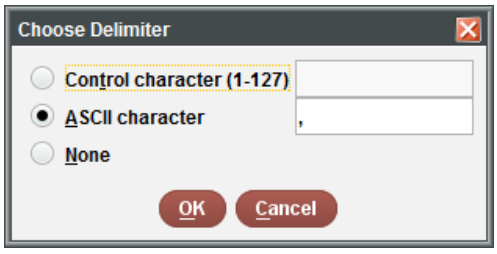
i. Here are the Types and Fields we want to export in our example:

j. **You could Apply Saved Export: Mark significant fields export 12/23/20**

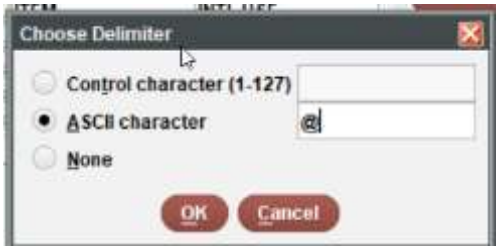
k. In the bottom half of the dialog box, choose the formatting details of the exported list. Default options are shown beside the format detail boxes. Most of the time, you will keep all of the defaults. You can specify the following information when necessary:

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).

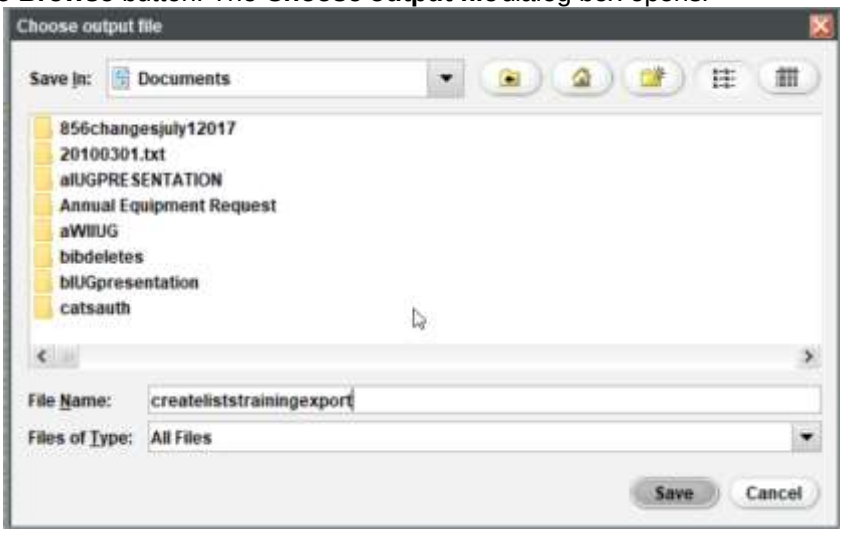
Text qualifier
What precedes and follows the text in each field that you export. The default is the quote character “

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

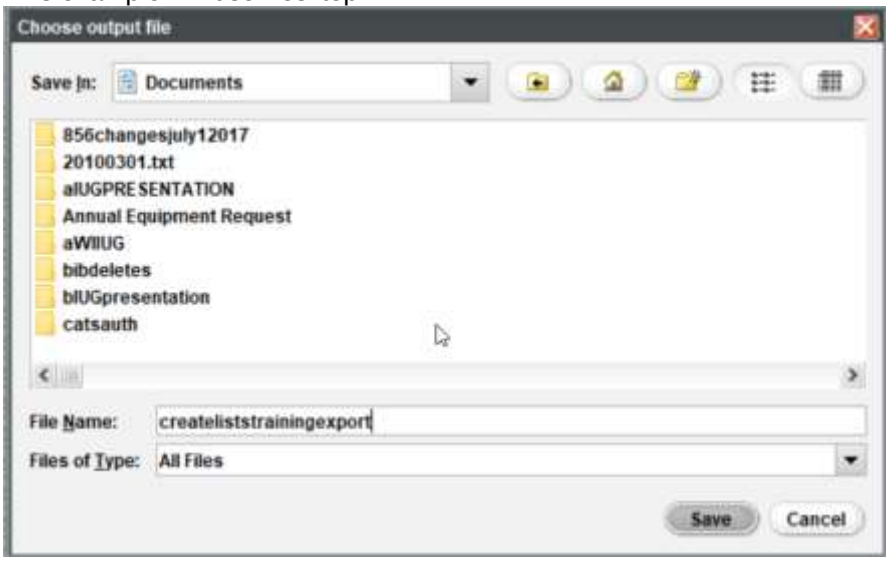
Maximum field length
Maximum number of characters to export from each field. By default there is no limit. You have the option of changing any of these defaults by clicking on the format detail. A **Choose Delimiter** dialog box opens where you can make your change:

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.

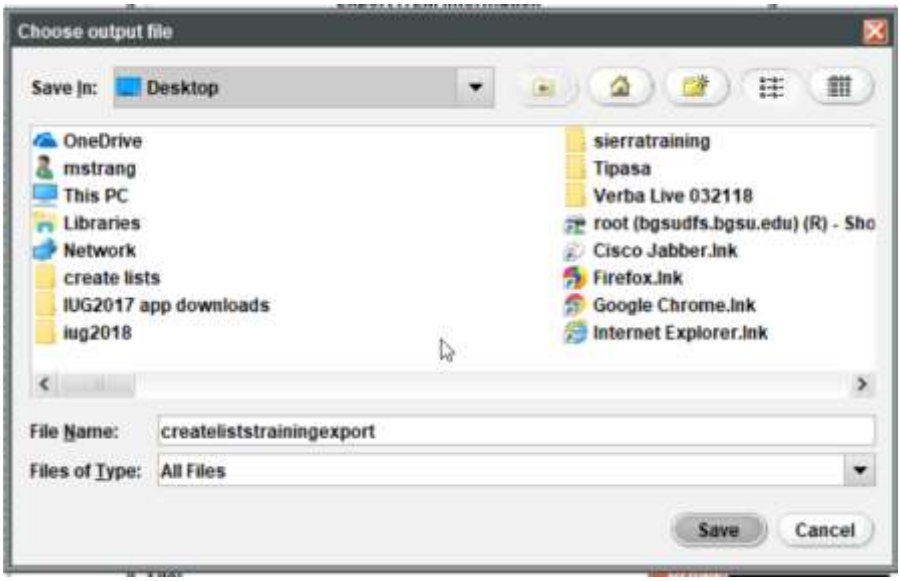
m. Click on the **Browse** button. The **Choose output file** dialog box opens.



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.

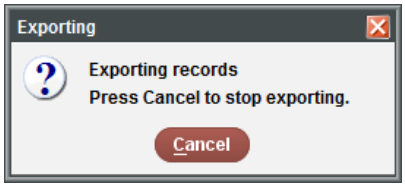


o. Enter a **File Name** and click **Save**. Be sure to leave the **Files of Type** as a Text (.txt) file for easy import into Microsoft Excel© or Access©.



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:

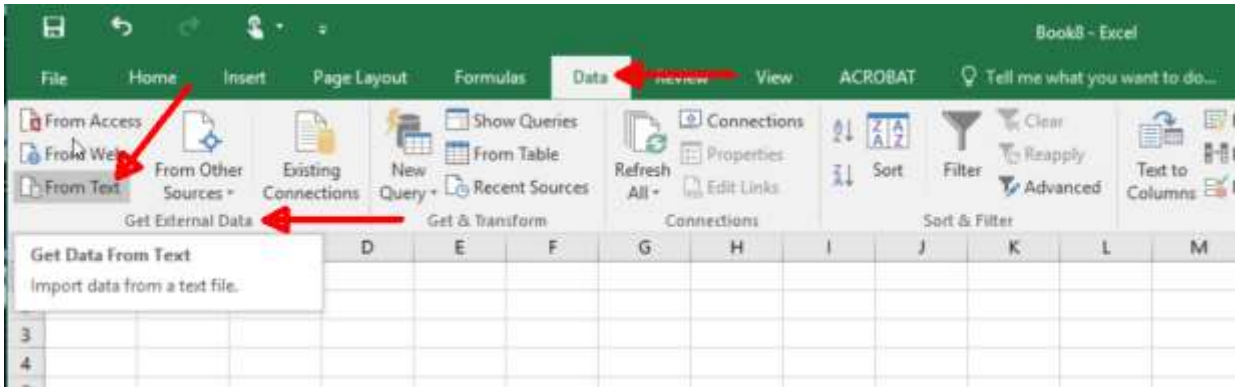


r. Click **Cancel** if you want to stop the export.

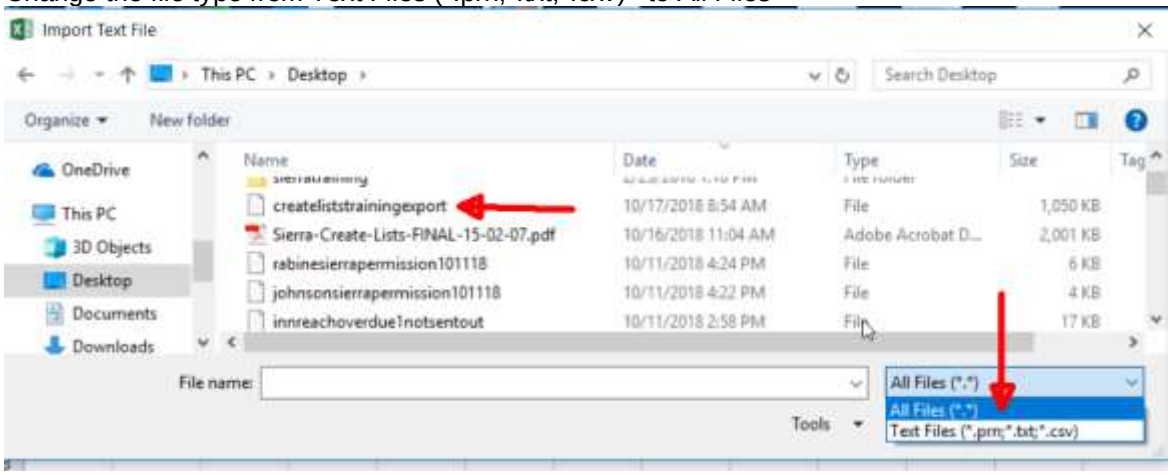
Importing Create List export file into Excel

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©.

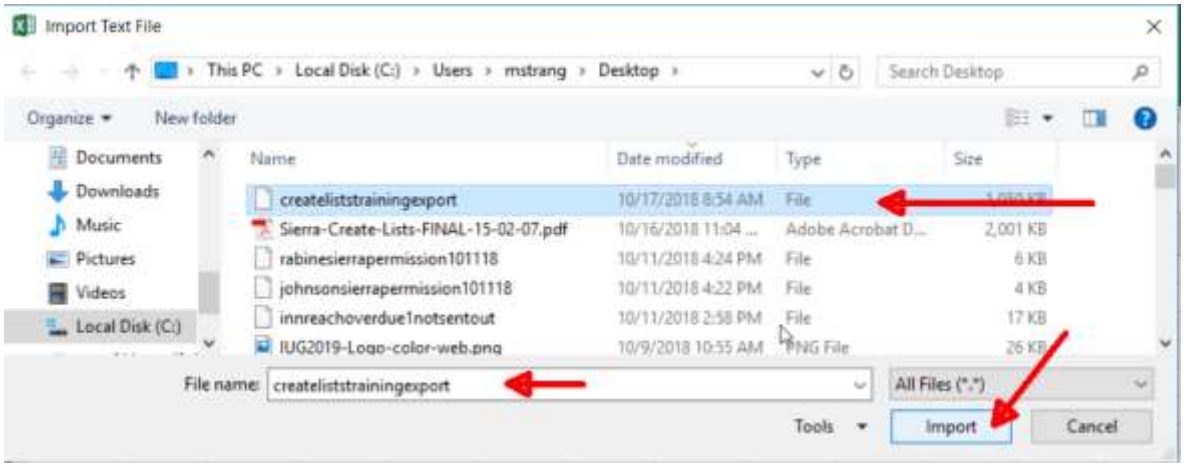
1. Open a blank document in Excel. Highlight the Data Tab
   Under the Get External Data ribbon
   Choose From Text



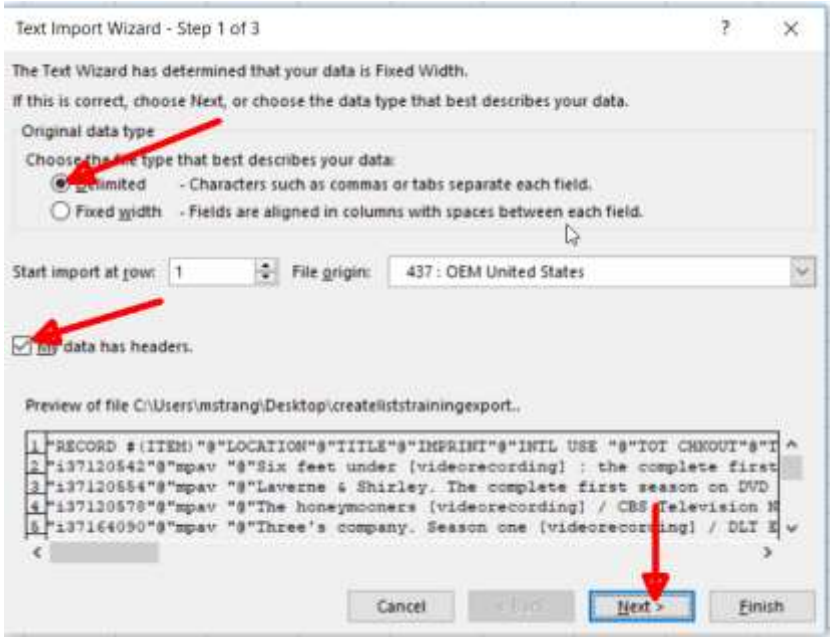
2. Navigate to the directory where you saved the export file
Change the file type from Text Files (*.prn;*.txt,*.cxv) to All Files



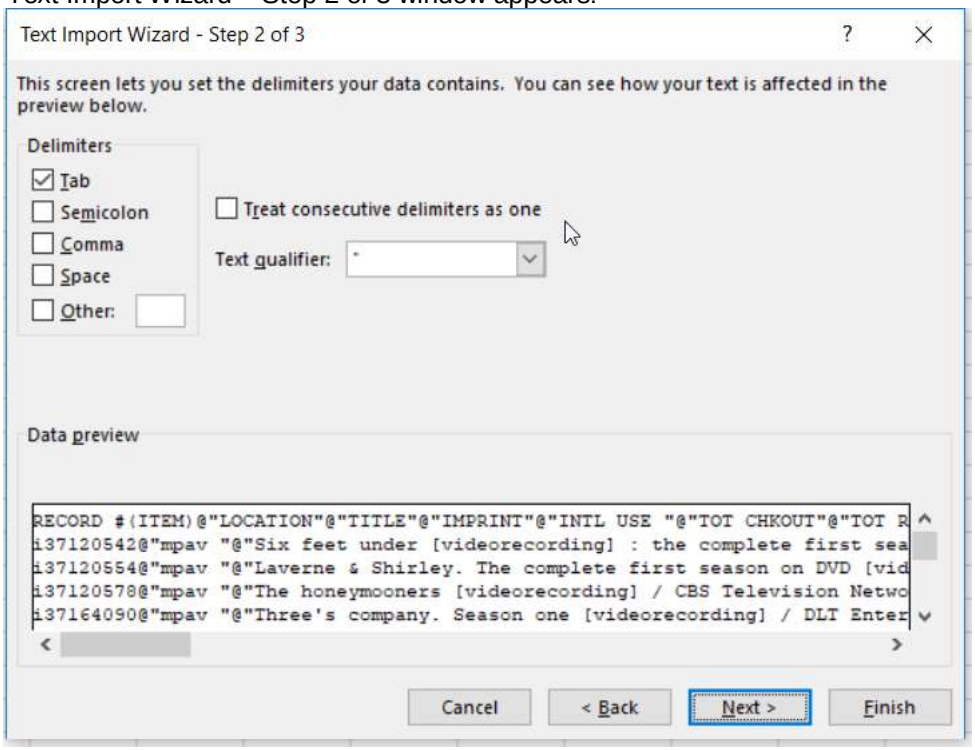
3. Highlight and click the file name. It will fill in the File name: window and then hit the Import button:



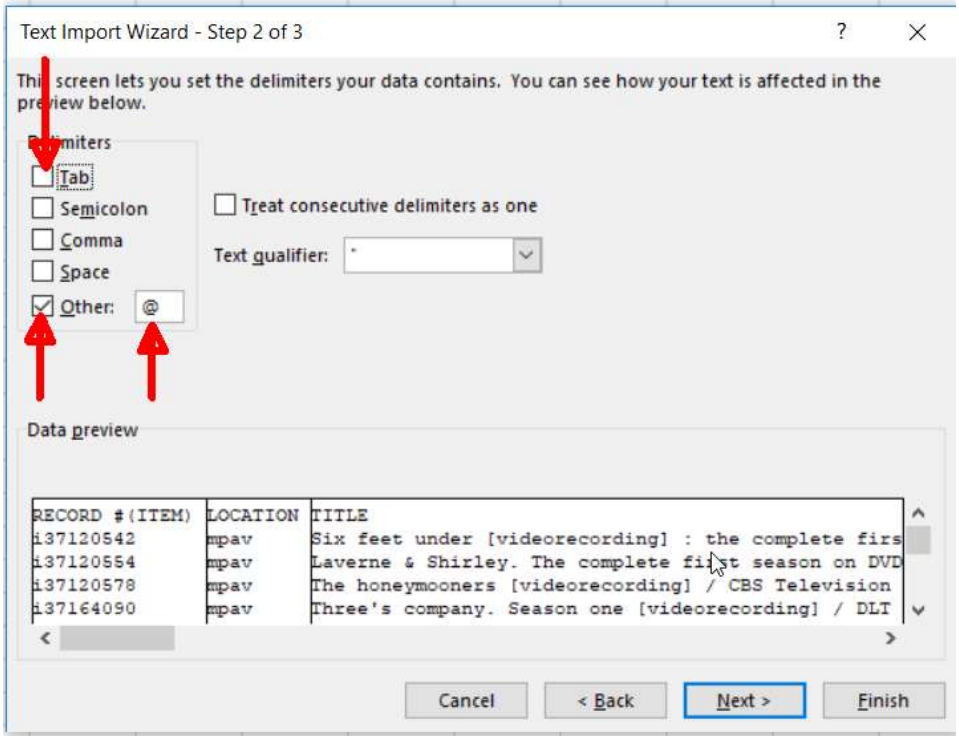
4. When the Text Import Wizard – Step 1 of 3 window appears:
   a. Choose Delimited
   b. checkmark My data has headers
   c. click Next



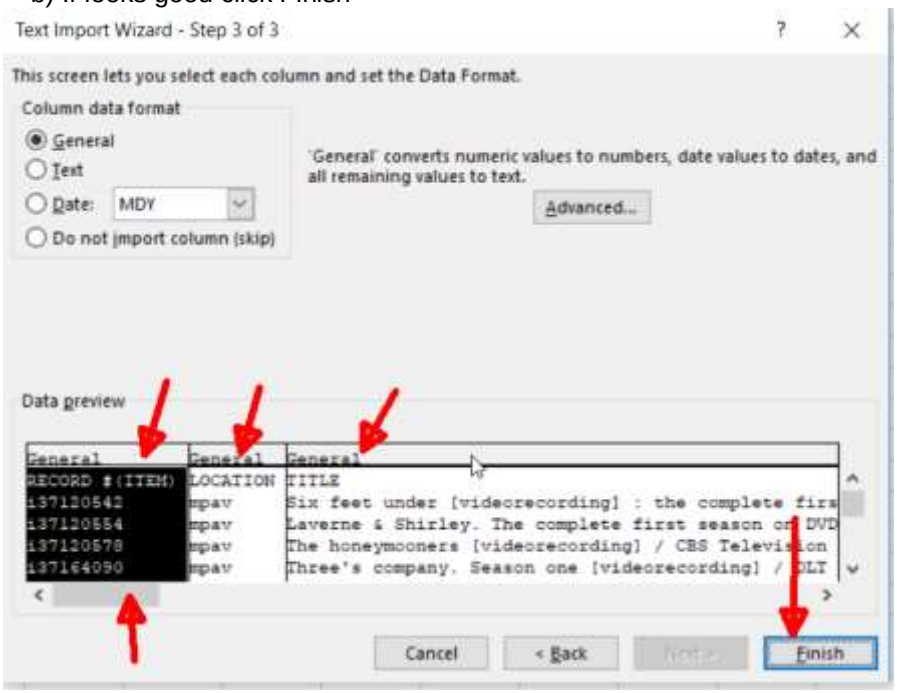
6. The Text Import Wizard – Step 2 of 3 window appears:



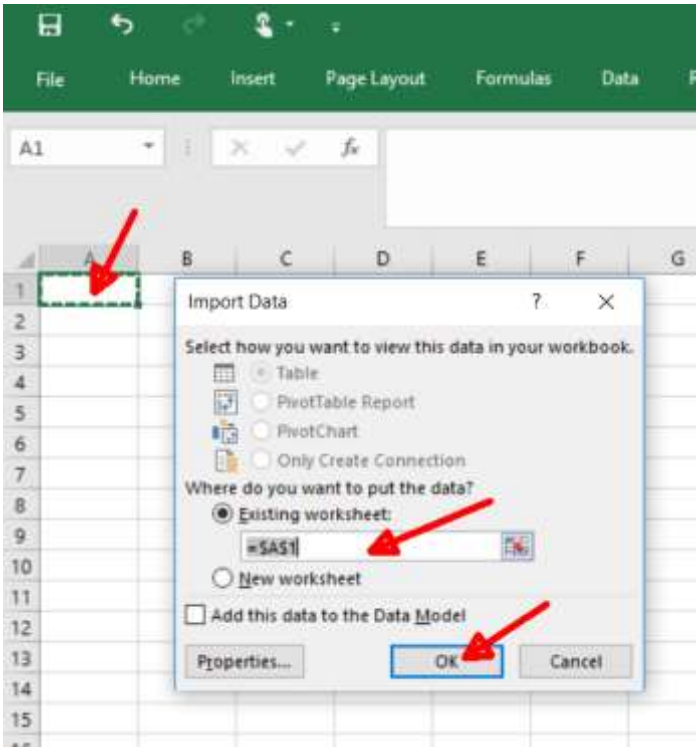
7. Text Import Wizard Setp 2 of 3
   a) Uncheck the box next to Tab
   b) Check the next to Other:
   c) Enter the @ symbol (Make sure the symbol matches what you choose in your export!)



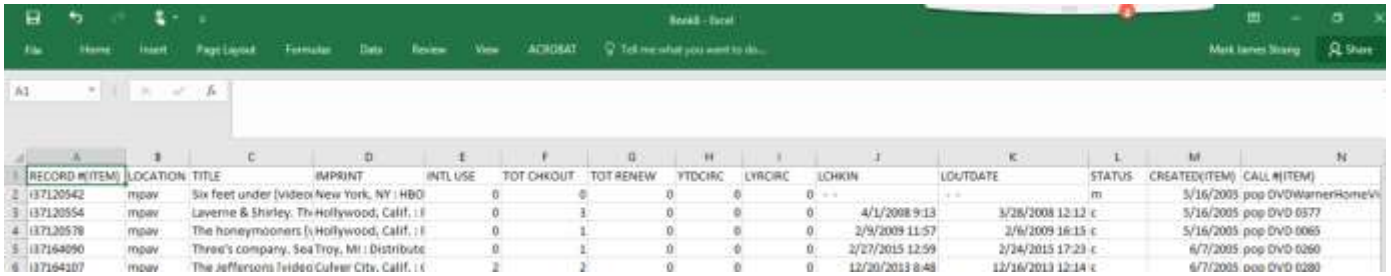
8. Text Import Wizard Step 3 of 3
    a) Check Data in Columns: Record # (ITEM), LOCATION, TITLE, etc. use slider to check other fields
    b) If looks good click Finish



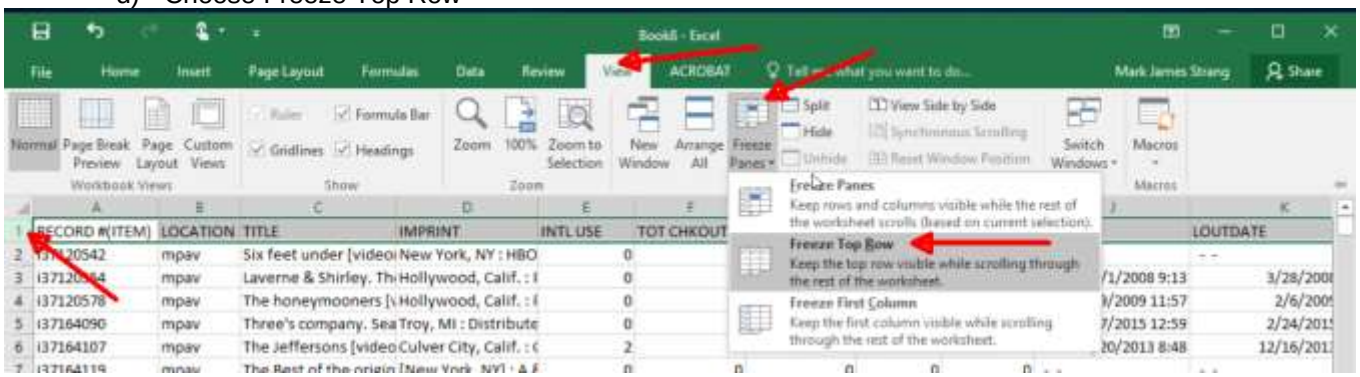
9. Excel Text Import Wizard Step 3 of 3
    a) Make sure Existing worksheet: has =$A$1
    b) Click OK button



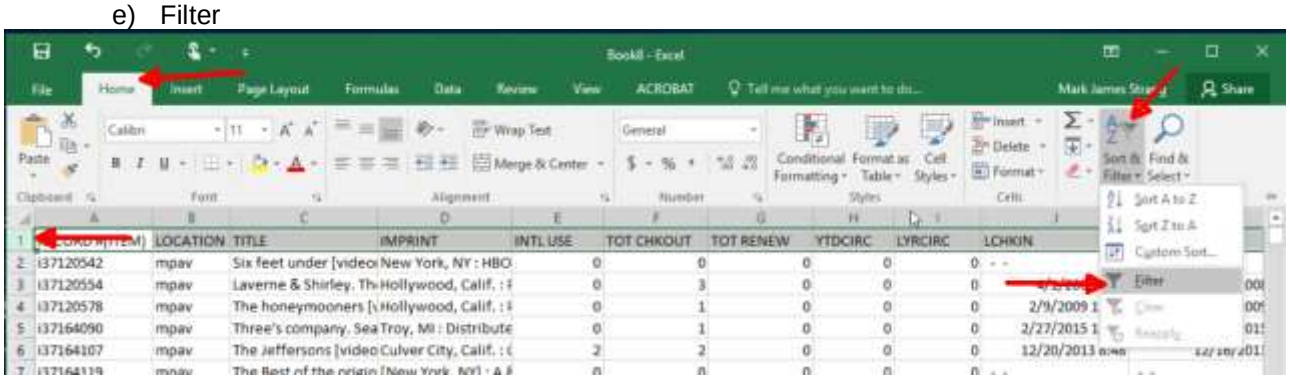
10. Data is In Excel



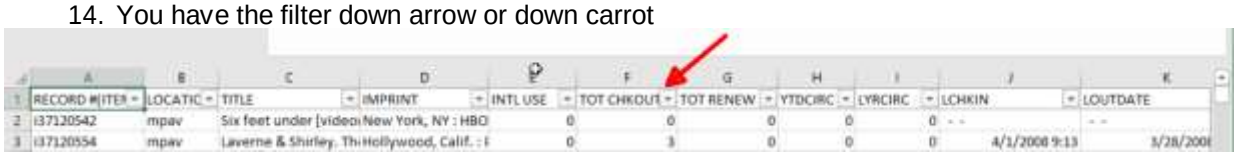
11. You may want to insert a column before column A and then number it 1 to end of rows. Since you sorted review file by Item Call # before export this allows you to put it back in call number order.
    order
12. Freeze top pain
    a) Highlight Row 1
    b) Choose Tab View
    c) Go to ribbon Freeze panes
    d) Choose Freeze Top Row



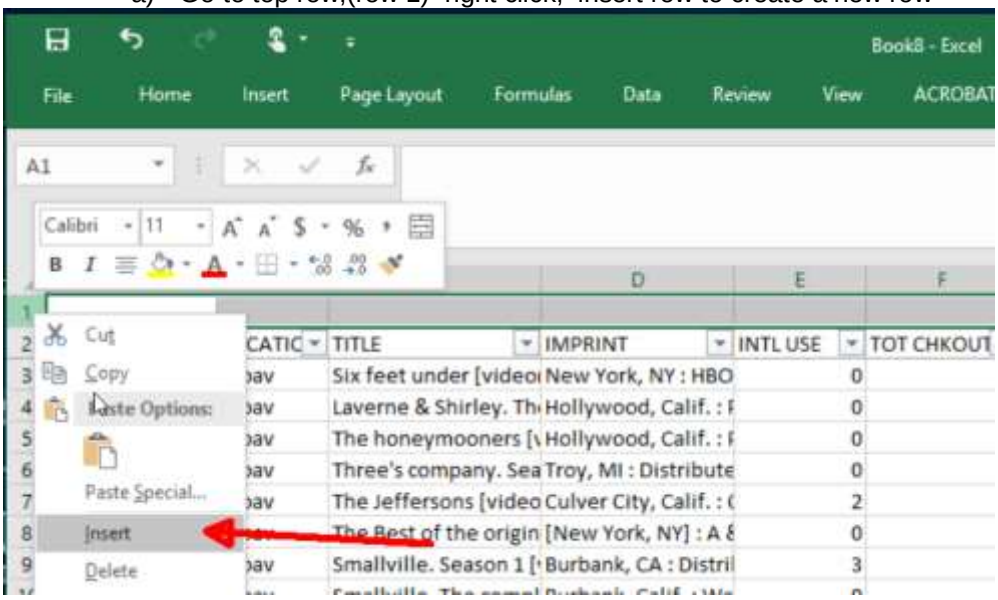
13. Filter Data
    a) Highlight Tow 1
    b) Choose Home Ta
    c) Editing
    d) Choose AZ Sort & Filter
    e) Filter



14. You have the filter down arrow or down carrot



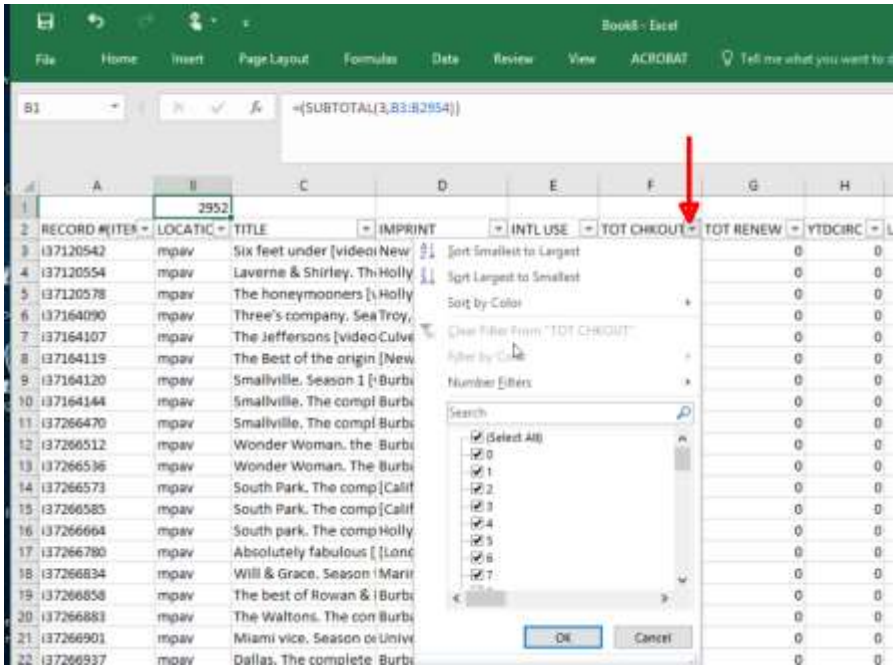
15. Insert new first row
    a) Go to top row,(row 1) right click, insert row to create a new row



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

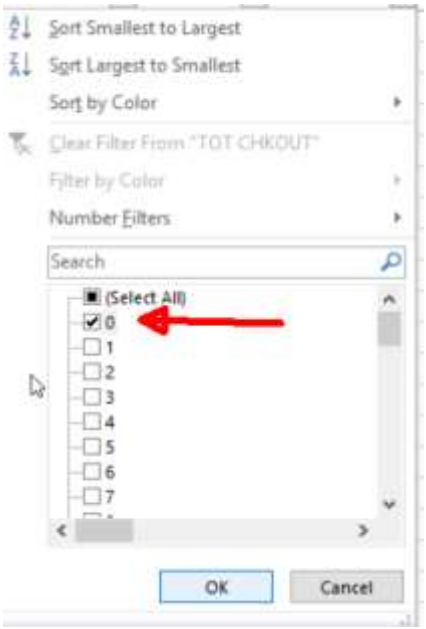
17. This gives us the total of all cells display with a filter.

18. Last we can filter and get count of results
    a) Click down arrow or carrot in the TOT CHKOUT column

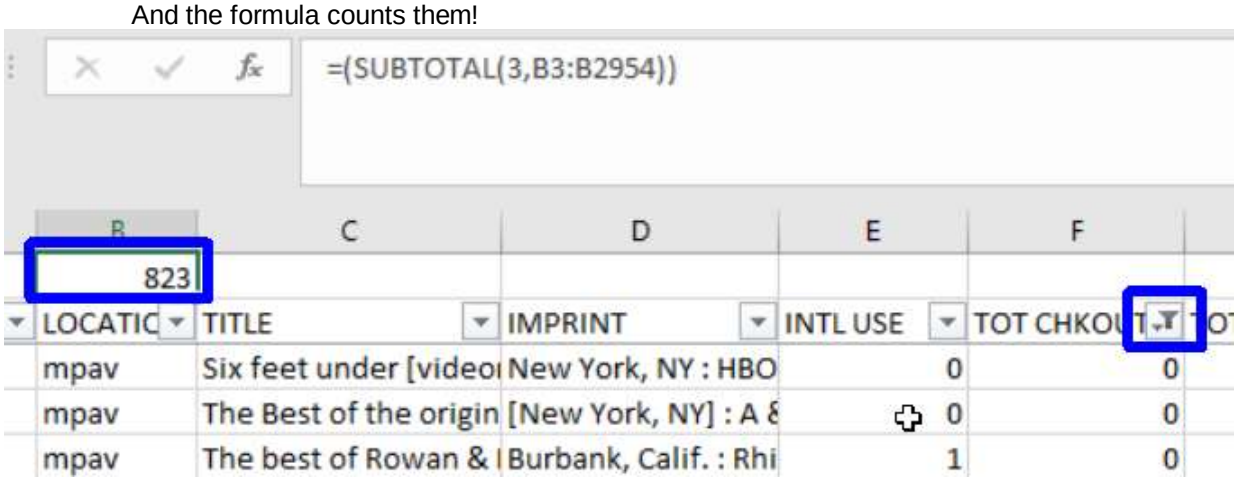


19. Uncheck Select All

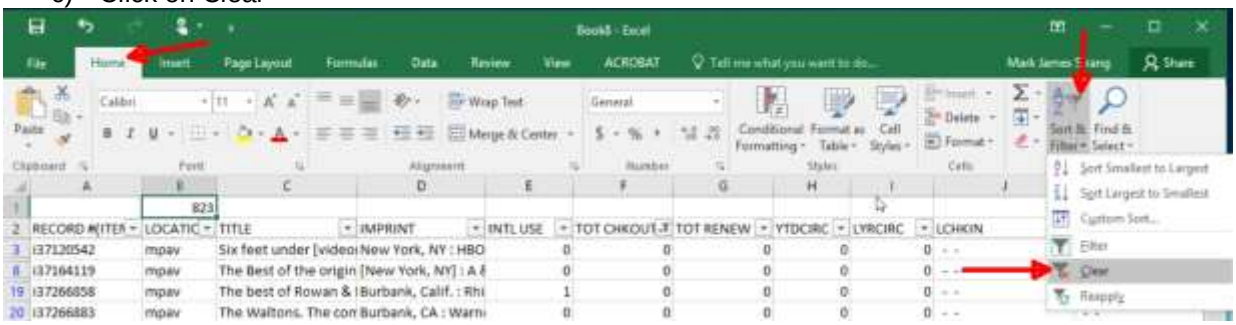
20. Select 0, and click OK



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

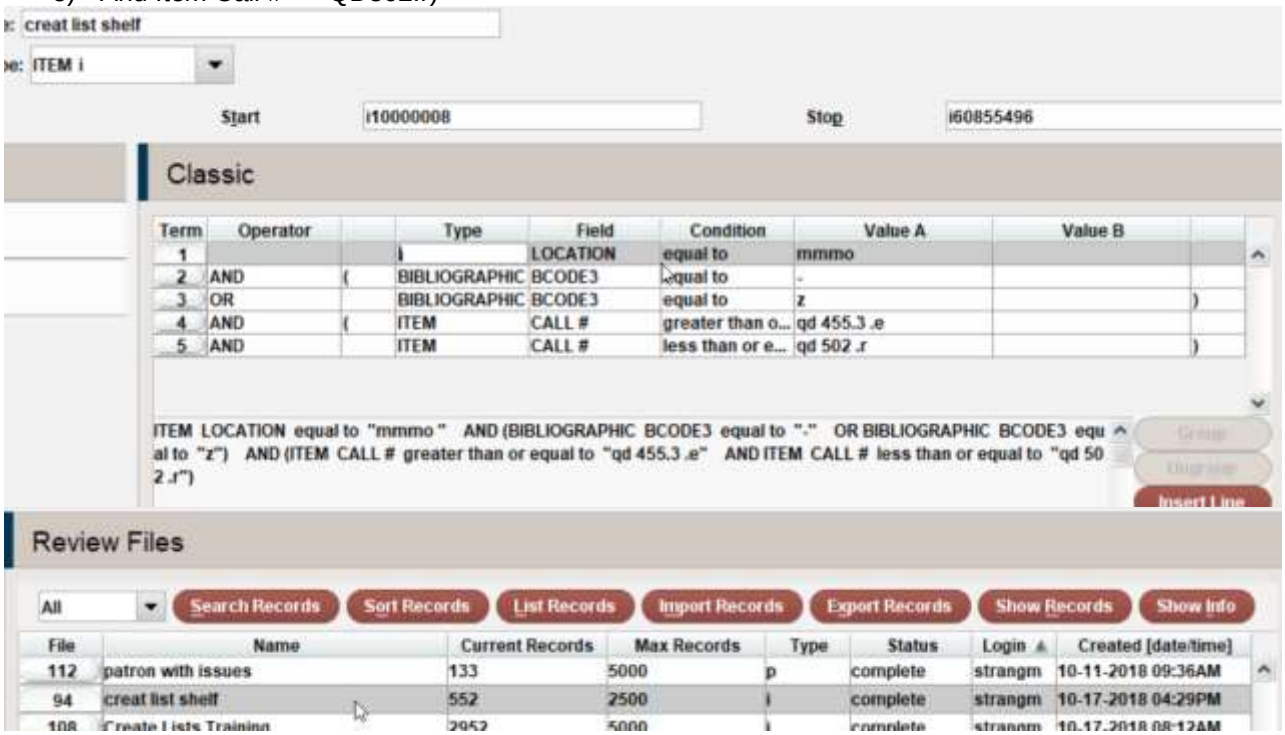


22. To Remove All Filters
    a) Home Tab
    b) Ribbon: AZ Sort & Filter
    c) Click on Clear



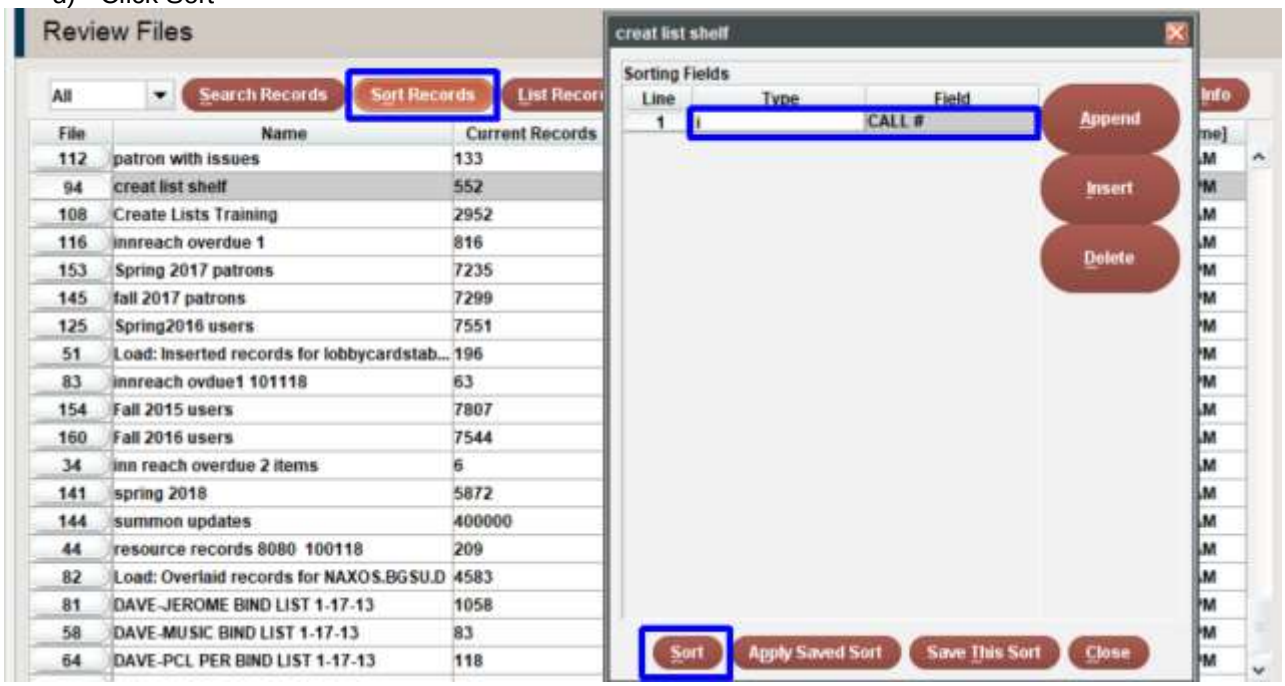
Use Sierra to create an Excel document for Shelf list reading

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



Sort by Call Number

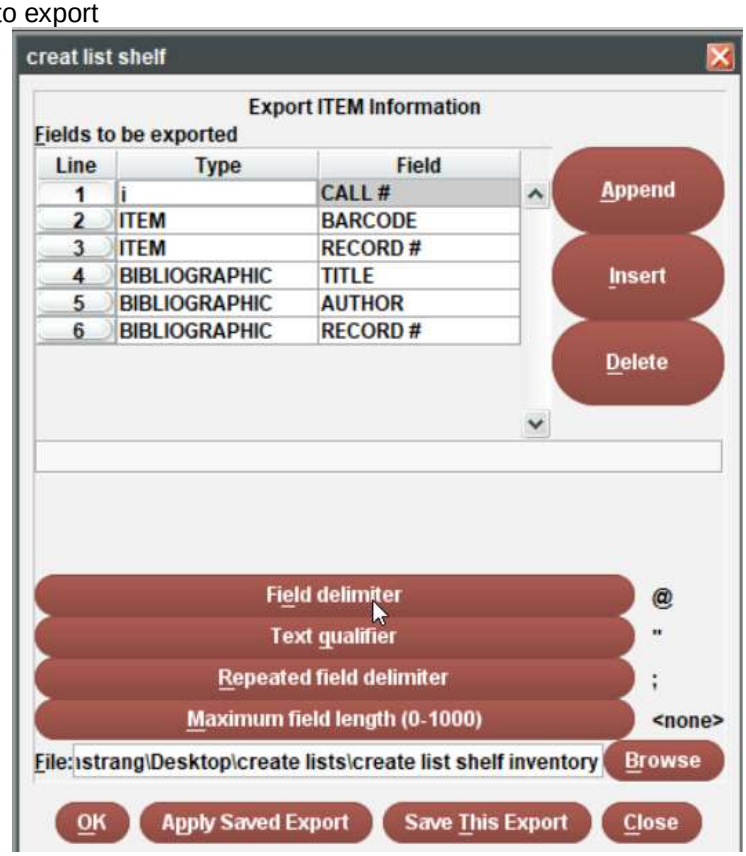
a) Click Sort Records
b) Choose type Item
c) Choose Call #
d) Click Sort



Highlight and hit Export Records

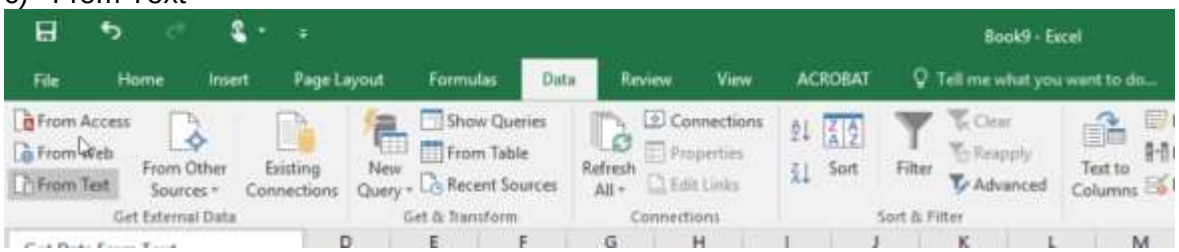
Choose what to export

a) Item Call #
b) Item Barcode
c) Item Record #
d) Bibliographic Title
e) Bibliographic Author
f) Bibliographic Record #
g) Choose Field Delimiter: @
h) Browse to save directory and name file
i) Click OK to export



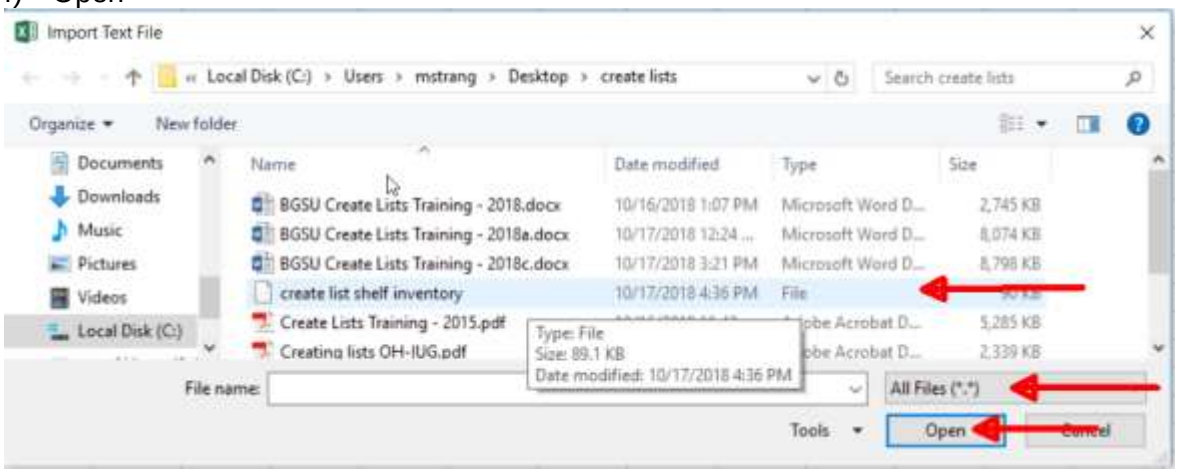
New Excel File

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



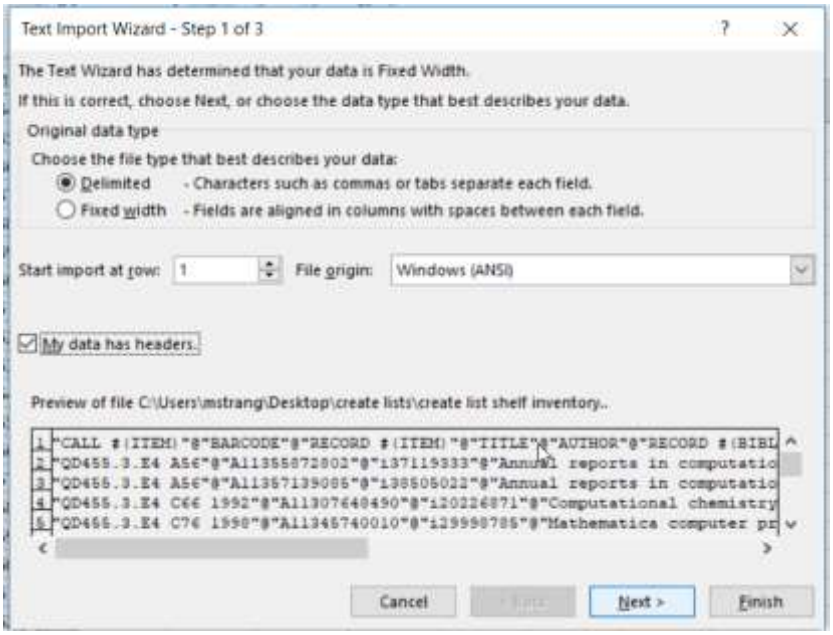
Navigate to file to get file:

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



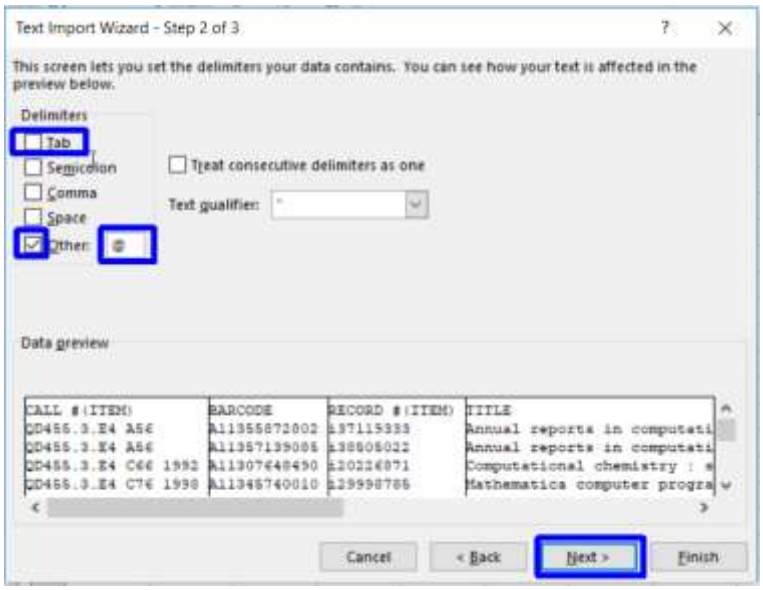
Import Wizard step 1 of 3

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



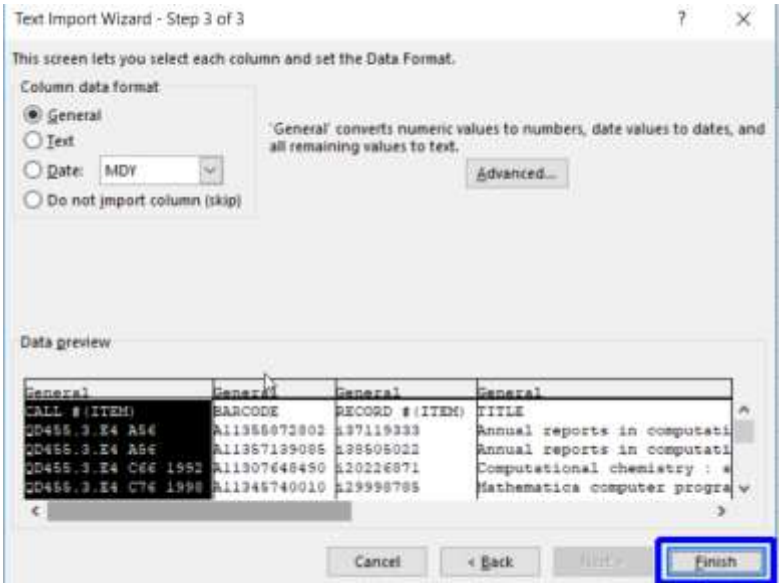
Import Wizard step 2 of 3

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



Import Wizard step 3 of 3

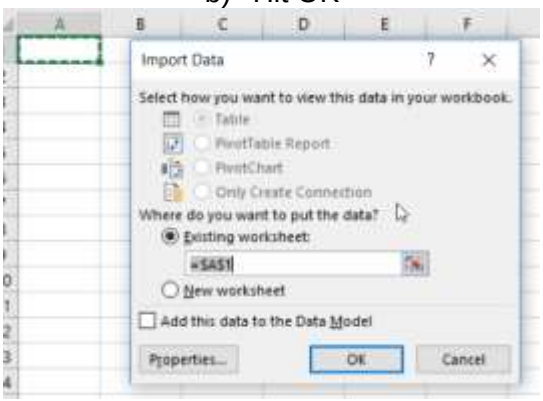
a) Make sure columns look decent and hit Finish



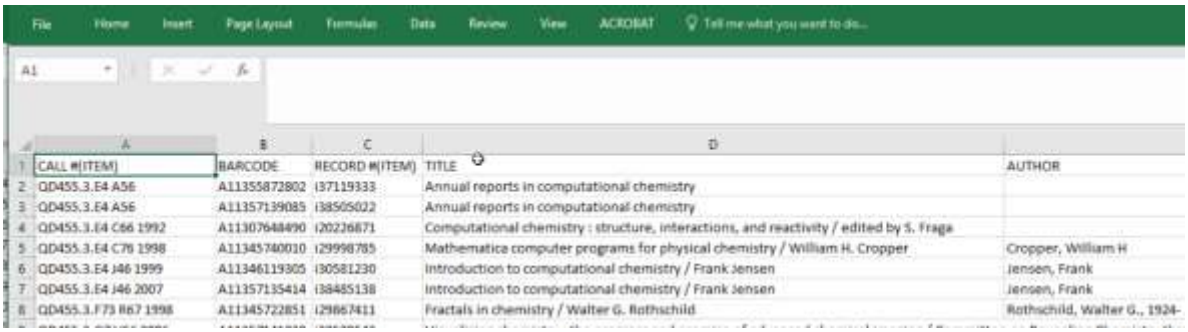
Import data screen

a) Choose column and row =$A$1

b) Hit OK



Excel document



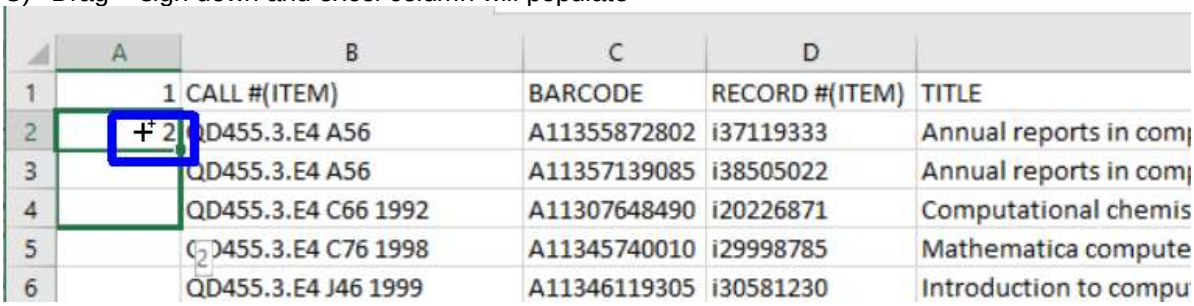
CALL #(ITEM)	BARCODE	RECORD #(ITEM)	TITLE	AUTHOR
QD455.3.E4 A56	A11355872802	i37119333	Annual reports in computational chemistry	
QD455.3.E4 A56	A11357139085	i38505022	Annual reports in computational chemistry	
QD455.3.E4 C66 1992	A11307648490	i20226871	Computational chemistry : structure, interactions, 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

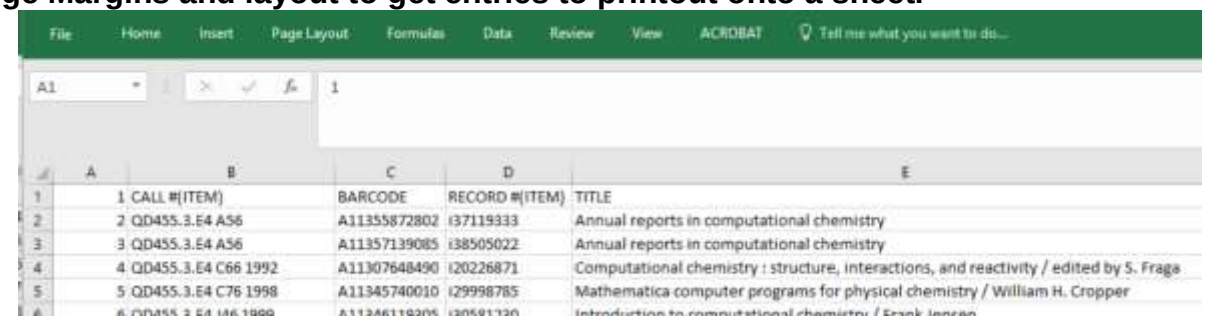
B) Number two cells and then put cursor on lower left column till double + sign

C) Drag + sign down and excel column will populate



	A	B	C	D	
1	1	CALL #(ITEM)	BARCODE	RECORD #(ITEM)	TITLE
2	2	QD455.3.E4 A56	A11355872802	i37119333	Annual reports in comp
3		QD455.3.E4 A56	A11357139085	i38505022	Annual reports in comp
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

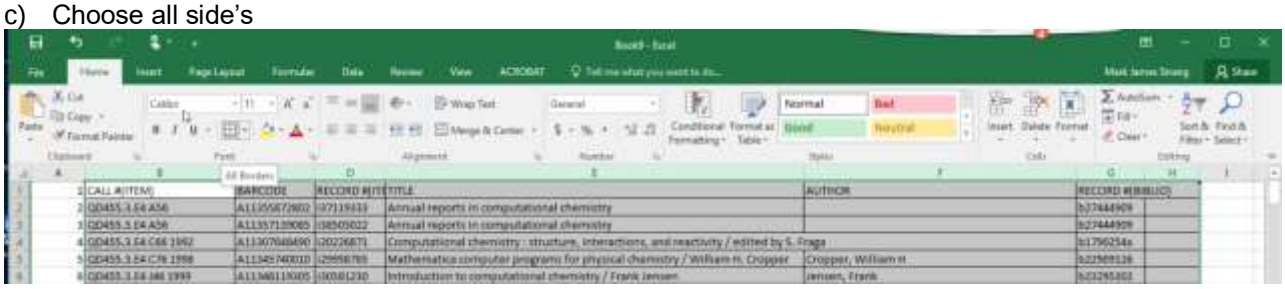
Change Margins and layout to get entries to printout onto a sheet.



	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. Fraga
5	5	QD455.3.E4 C76 1998	A11345740010	i29998785	Mathematica computer programs for physical chemistry / William H. Cropper

Highlight Columns

a) Under Home Tab
b) Font Ribbon
c) Choose all side's

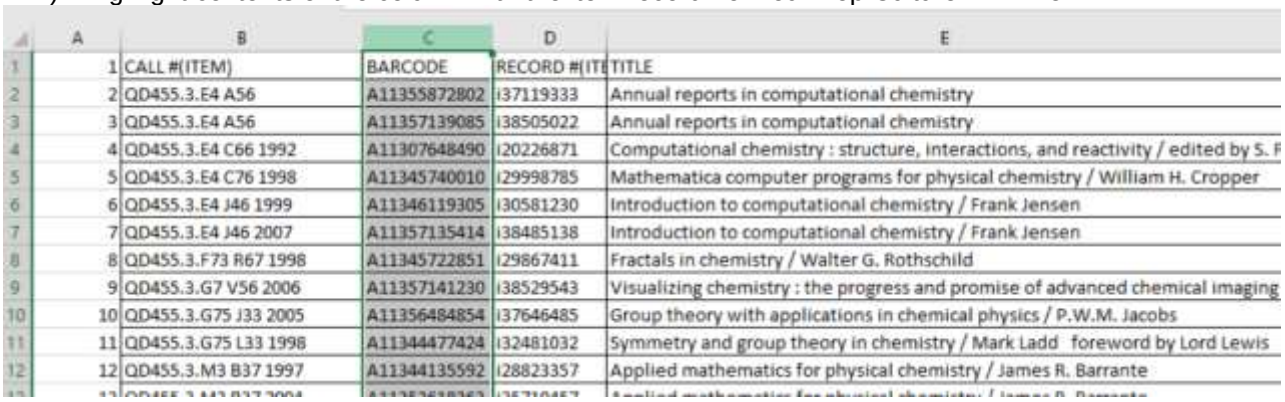


Print

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

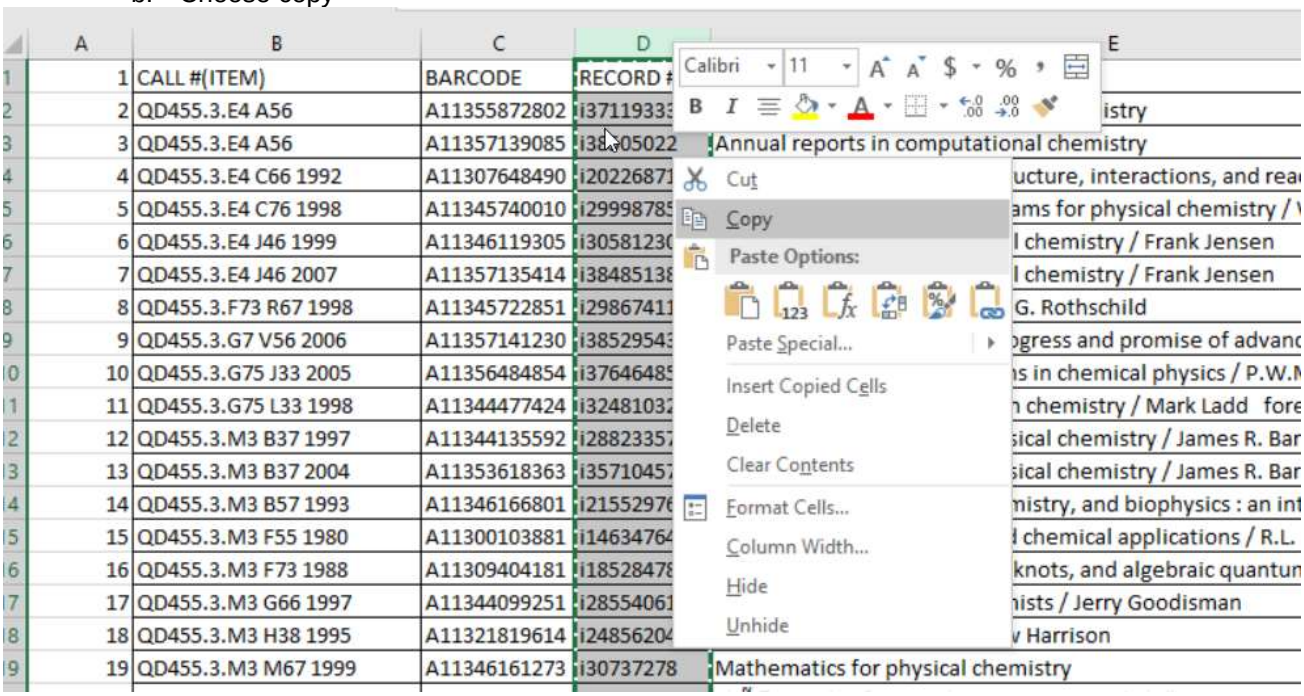
Create Review file from Excel

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

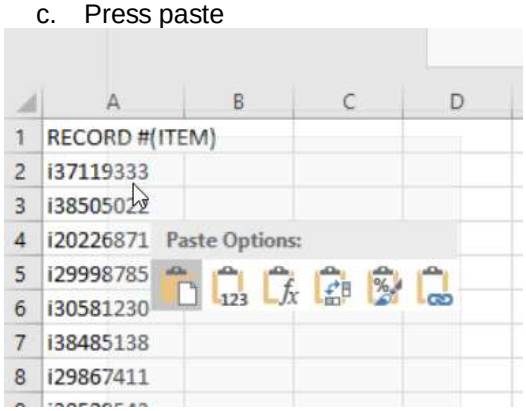


	A	B	C	D	E
1	1	CALL #(ITEM)	BARCODE	RECORD #(ITE	TITLE
2	2	QD455.3.E4 A56	A11355872802	i37119333	Annual reports in computational chemistry
3	3	QD455.3.E4 A56	A11357139085	i38505022	Annual reports in computational chemistry
4	4	QD455.3.E4 C66 1992	A11307648490	i20226871	Computational chemistry : structure, 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

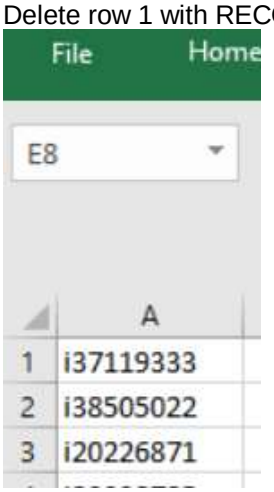
2) Copy column
   a. Right click
   b. Choose copy



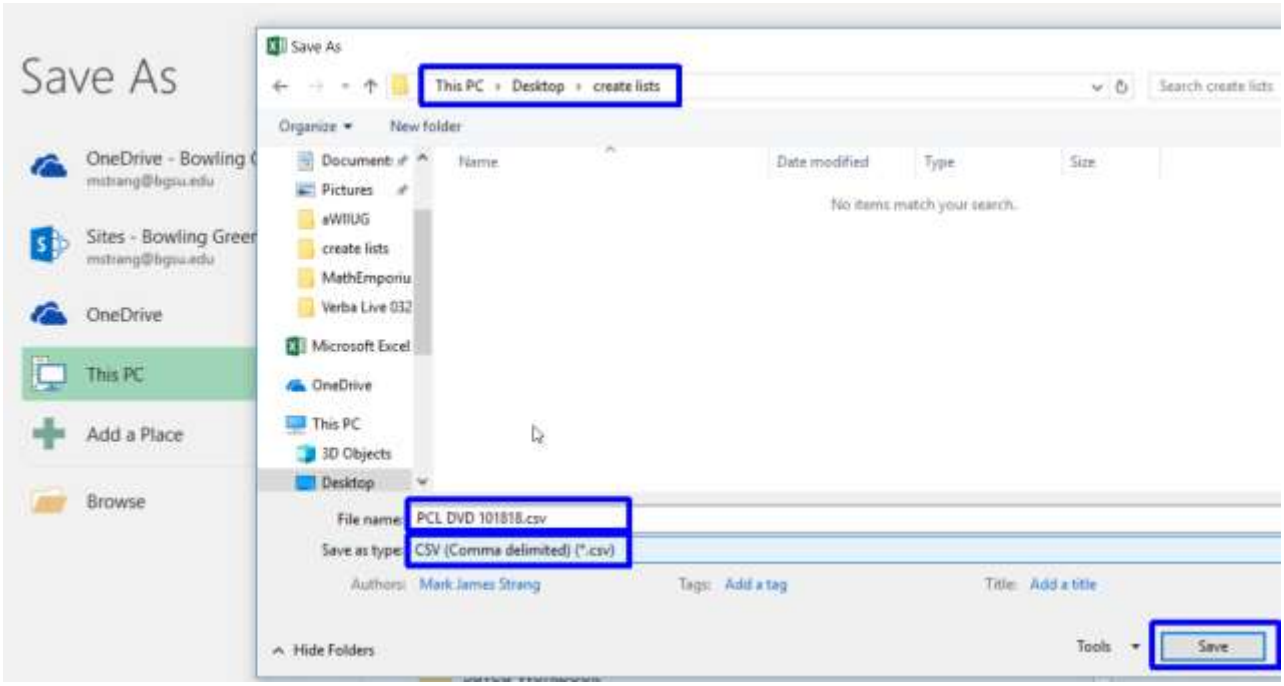
3) In new excel document
   a. Put cursor in A1
   b. Right click
   c. Press paste



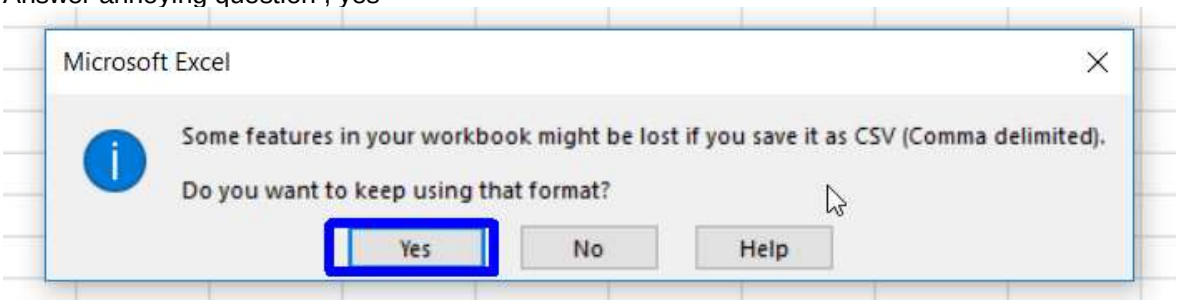
4) Massage file
    a. Delete row 1 with RECORD #(ITEM)



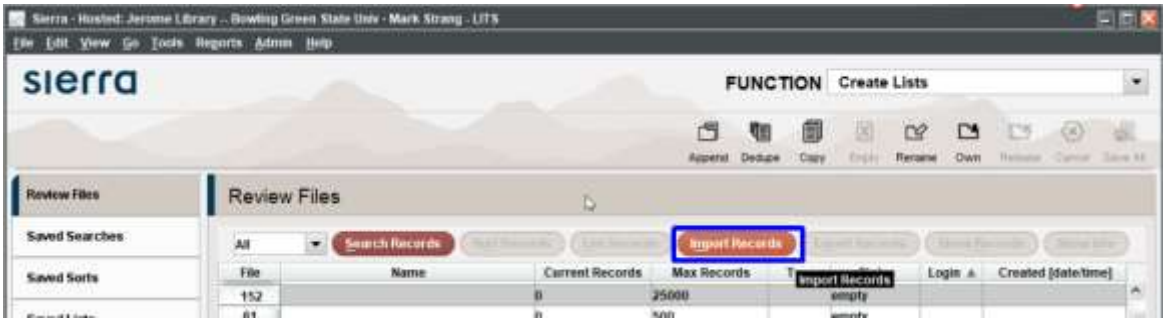
5) Save as CSV
    a. Navigate to folder
    b. Name file
    c. Select as type: change to CSV)Comma delimited)(*.csv)
    d. Save



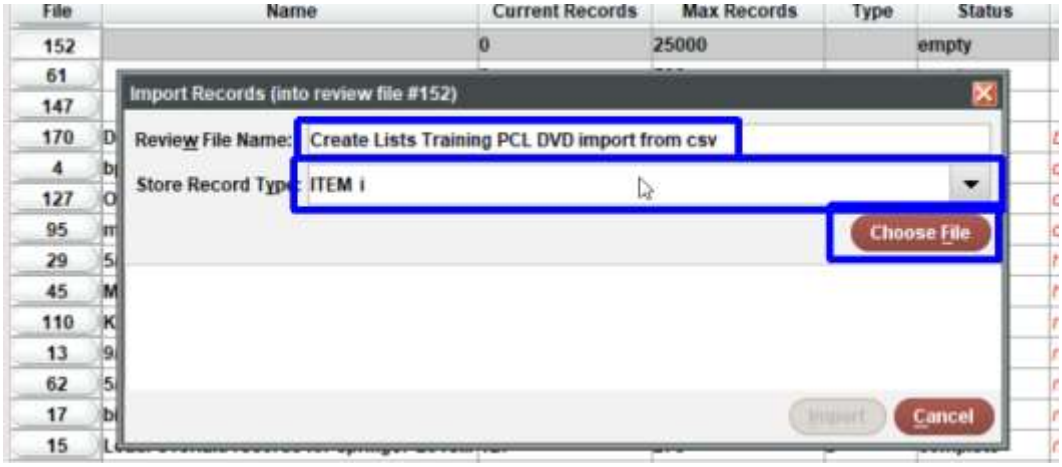
6) Answer annoying question , yes



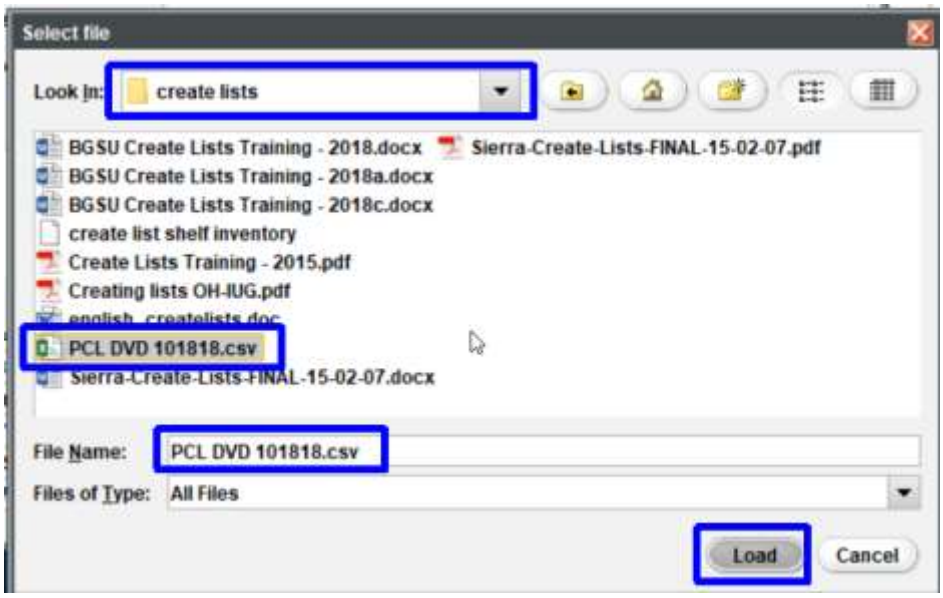
7) Sierra Create Lists
    a. Click on Import Records



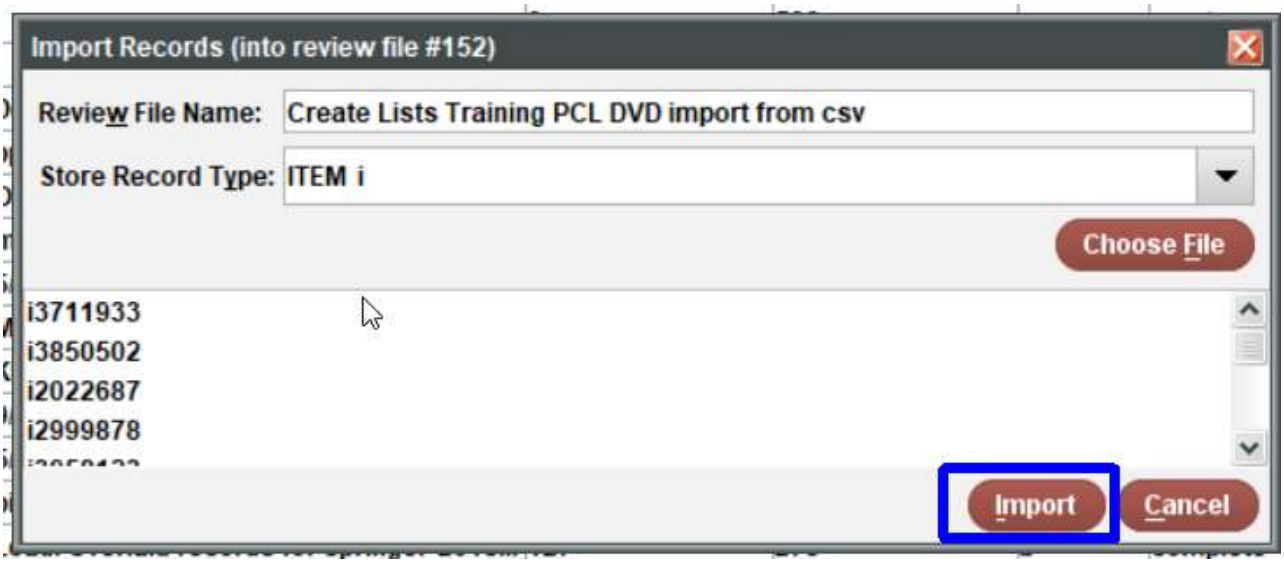
8) Sierra Import Records
   a. Name Review File
   b. Choose the record type item for Store Record Type
   c. Choose File



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

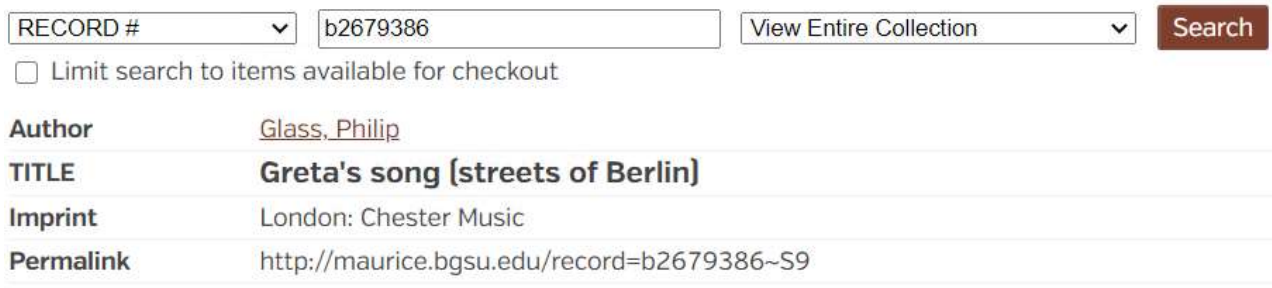


11) Voila, review file is created from your modified Excel file!
(In this case we still have 552 records like the original export!)

12) Open review file and inspect records:

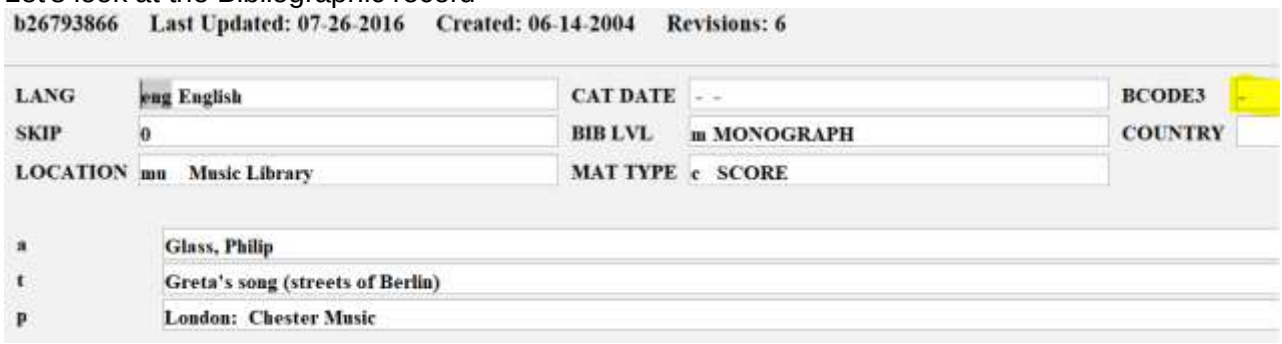
Find Bibliographic Records with no attached records (Data Cleaning)

You come across this record in the public catalog and something looks off:
http://Maurice.bgsu.edu/record=b2679386

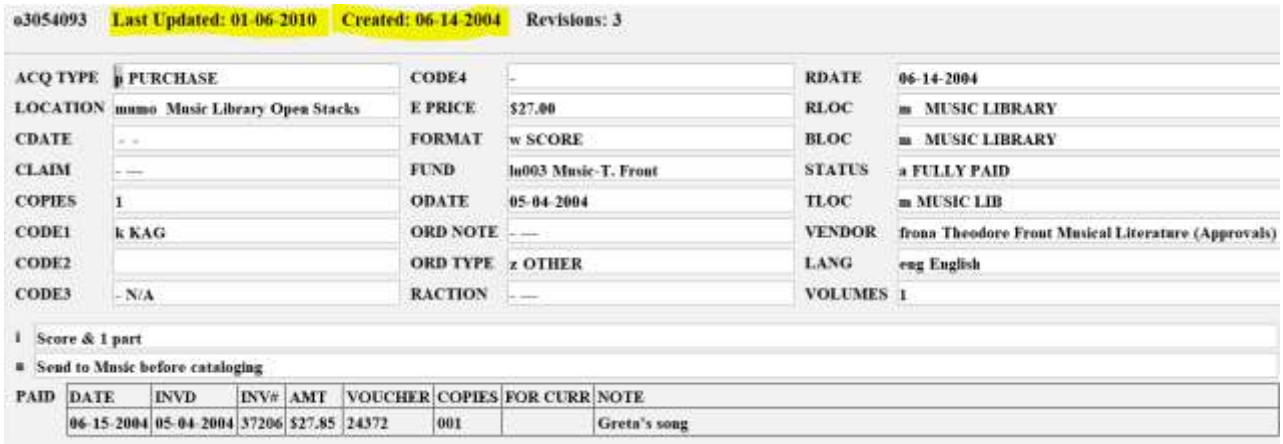


Pull it up in Sierra, huh it only has an order record

Let's look at the Bibliographic record

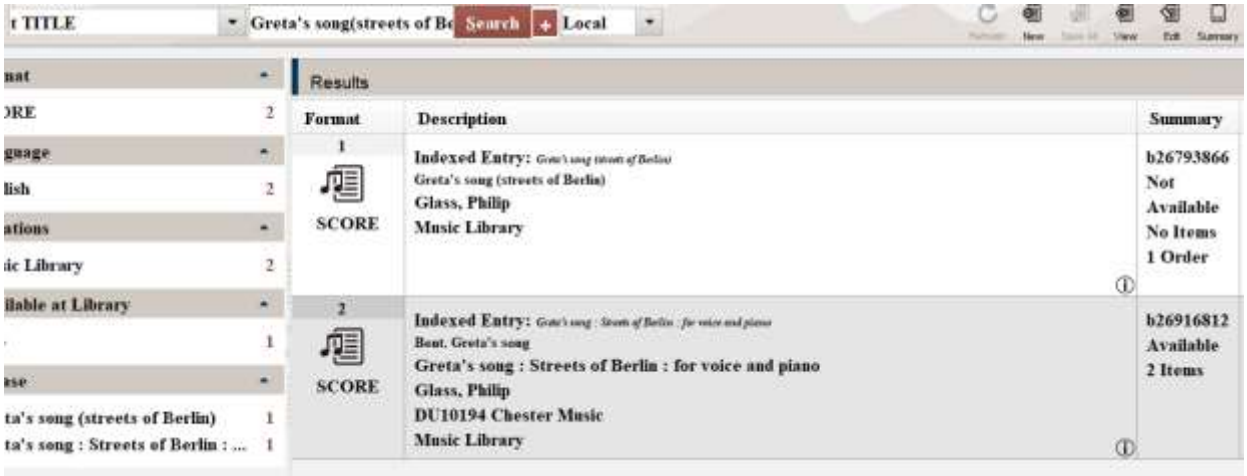


We see the bcode3= - so it displays to the public
The record is kind of brief so it was probably never properly cataloged.
Lets look closer at the order record:

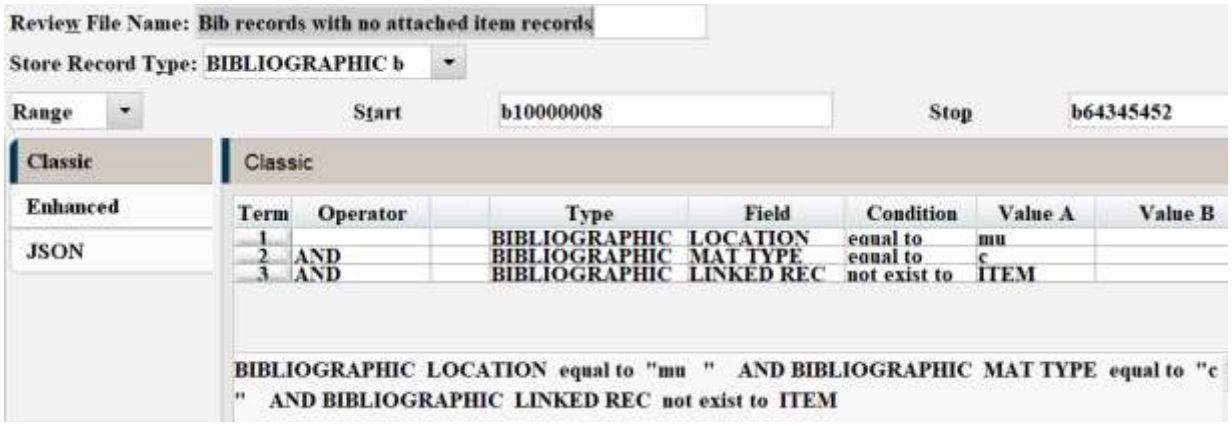


The order record was created in June of 2004 and was last updated Jan 2010.

A title search of the record shows:



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.



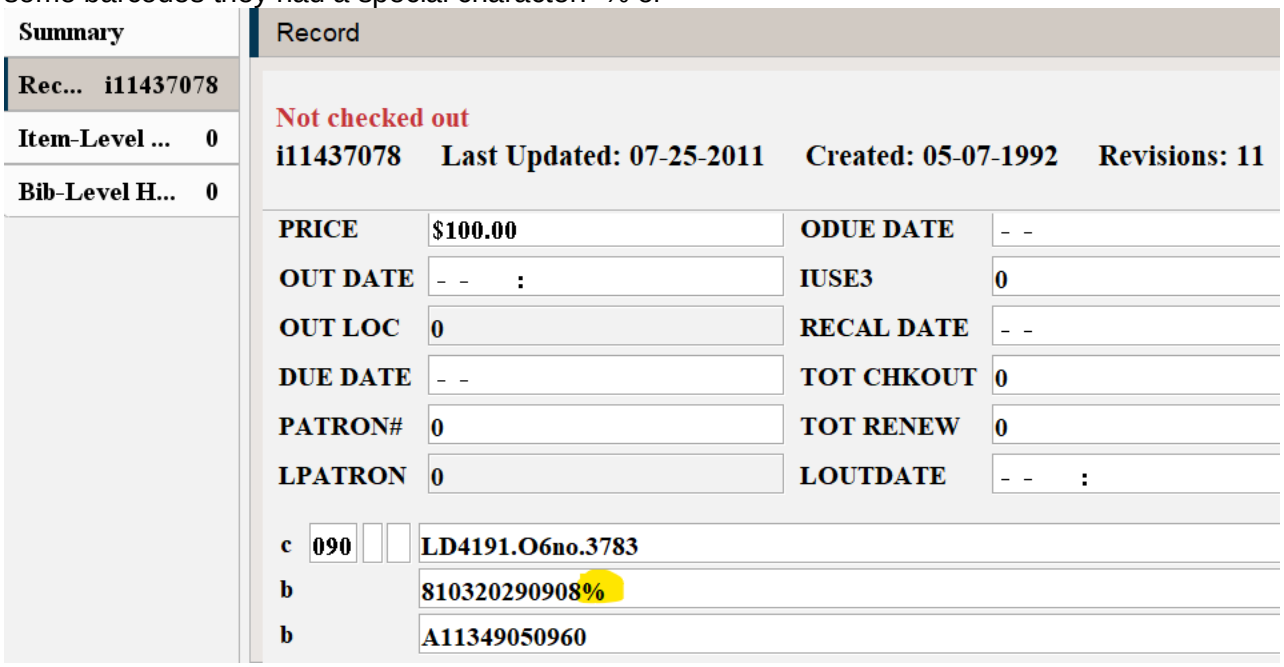
I used the field “LINKED REC” with the Condition of “not exists to” to find Bib records that do not have attached item records. The Bib loc = mu and the Mattype = c were used to avoid getting serials which frequently don’t have item records but are correct.

160	Bib records with no attached item records	228	10000

I ended up with 228 records that I’ll need Music or Acquistion'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 -

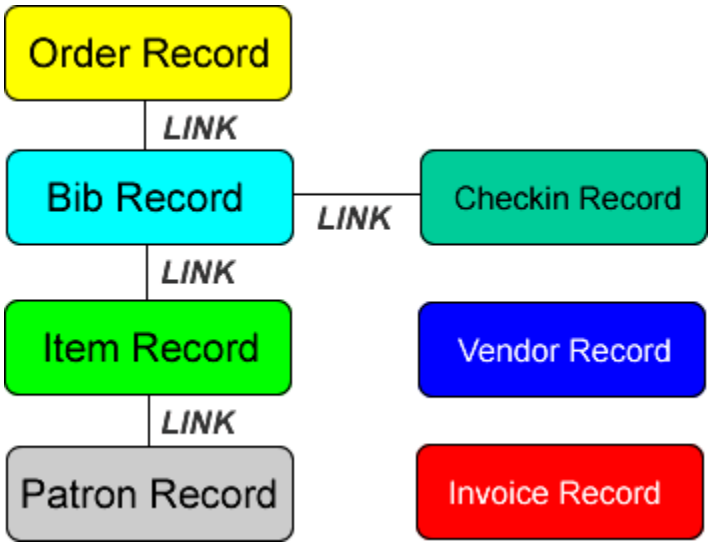


Tried using conditions: “has” and “ends with” no luck

However, they condition: “matches” picked right up on them:

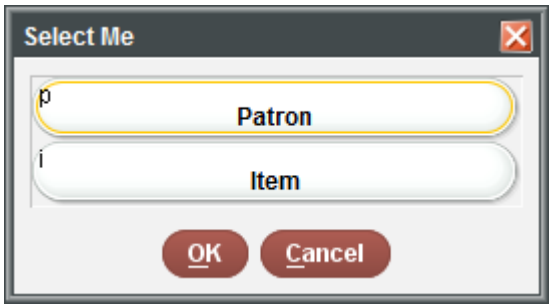
Appendix A. The Law of One Hop

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.

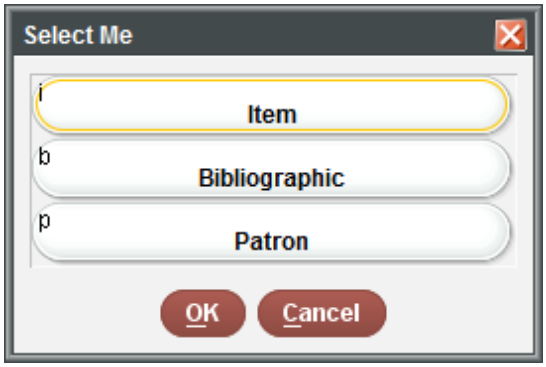


This diagram helps to explain why different **types** are available in the table for search criteria depending on the type of record you chose in the **Store Record Type** field.

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.maineinfonet.org/supportportal/training/create-lists/

Create Lists - Steve Heser, MCFLS
http://www.mcfls.org/createlists/ 1 hour 30 minutes Oct. 20, 2016

Create Lists Manual Steve Heser, MCFLS and Stephanie Zimmerman of LS of LC, PN
http://www.mcfls.org/createlists/Create%20Lists%20Training%20-%202015.pdf

You Tube Videos

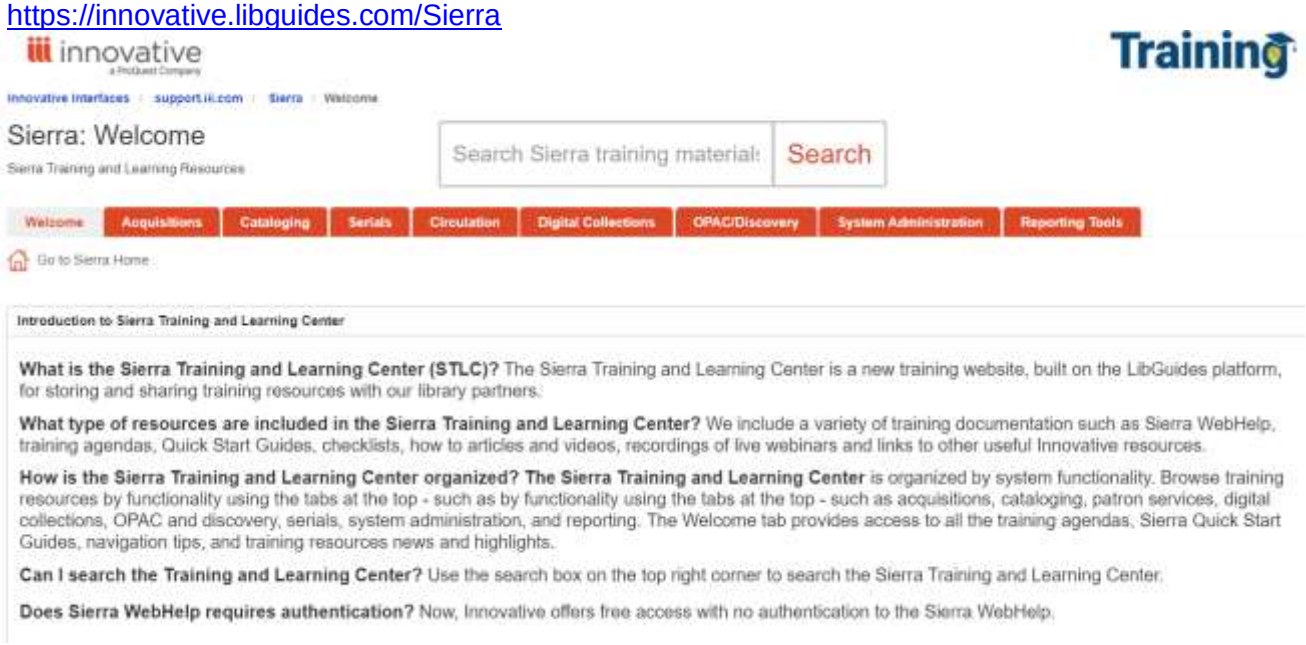
Introduction to Create Lists Steve Heser, MCFLS 10/12/17
https://www.youtube.com/watch?v=LbYrt_IPUdQ 1 hour 10 minutes
slides: https://drive.google.com/file/d/0B-U_wAllpfPbMmdxZ3dGMzJmSm8/view

Advanced Create Lists and Sierra Statistics, Steve Heser, MCFLS 11/1/17
https://www.youtube.com/watch?v=GFdAPSlpdh4 2 hours
slides: https://docs.google.com/presentation/d/1frRYD05uAIy_512-YtxYIxo3PhQPl2yH8WmFqTcguuw/edit#slide=id.p4

Web Management Reports Steve Heser, MCFLS
https://www.youtube.com/watch?v=20zU_5K7PB8 2 hour

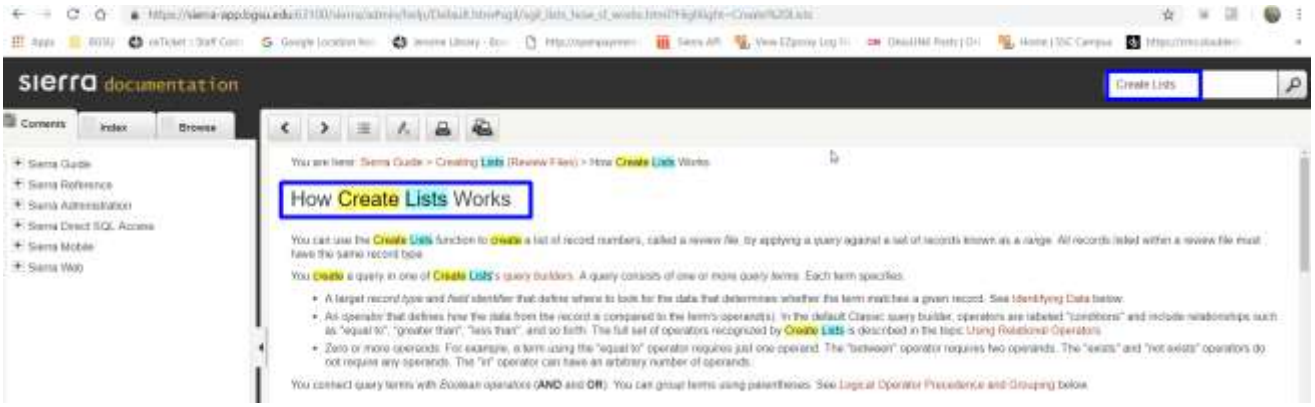
Innovative Sierra Training Website (new 2020)

https://innovative.libguides.com/Sierra



Sierra Manual:

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



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 afield.

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 cml," "**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 "**Canad**a" and "**Canad**ian".

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

Appendix D Handy Notes: