



# Finding Messy Data:

*Create Lists and Excel*

Mark Strang, Bowling Green State University

10:00 AM - 11:00 AM

Wednesday, March 24, 2021

Tuesday, March 23 – Thursday, March 25

# Land Acknowledgement

The region Bowling Green State University inhabits is in the Great Black Swamp and the Lower Great Lakes region. This land is the ancestral territory of the Wyandotte, Huron, Kickapoo, Erie, Miami, and Peoria. We recognize these historical and contemporary ties in our efforts to further the conversation around decolonizing history and honoring Indigenous individuals and communities who have been living and working on the land from time immemorial.

Map provided by: [Native-Land](#)



# Terminology

The terms Create Lists, Lists, and Review Files are used interchangeably for the function Create Lists in Sierra and Millennium

The screenshot shows the Sierra library system interface. The title bar indicates the user is logged in as Mark Strang at Bowling Green State University. The main menu includes File, Edit, View, Go, Tools, Reports, Admin, and Help. The current function is 'Create Lists'. A toolbar contains icons for Append, Dedupe, Copy, Empty, Rename, Own, Release, Cancel, and Save All. The left sidebar lists navigation options: Review Files, Saved Searches, Saved Sorts, Saved Lists, and Saved Exports. The main content area is titled 'Review Files' and features a dropdown menu set to 'All' and several action buttons: Search Records, Sort Records, List Records, Import Records, Export Records, Show Records, and Show Info. Below these buttons is a table with the following data:

File	Name	Current Records ▲	Max Records	Type	Status	Login	Created [date/time]
86		0	2500		empty		
139		0	5000		empty		
98		0	2500		empty		
89		0	2500		empty		

# Agenda

- BGSU unique info
  - BGSU Sierra information
  - Bibliographic & Item record suppression for INN-Reach Central Catalog
  - Bibliographic bcode3 use to remove records from Summon discovery layer
- Review File Tools
  - Edit Existing Query
  - Saved Searches
  - Saved Sorts
  - Saved Lists
  - Saved Exports
  - Saving a Search
  - Applying Saved Export
  - !MARC Tag Query
  - Next & Previous record shortcuts
- Exporting Records
  - Case Study: Examine DVDs in mmav Main A/V and mpav Browne Popular Culture Library A/V
  - Example Review File
  - Fields to export



#IUG2021



# Agenda

- Excel Import
  - Excel 2016
  - Excel 365 Pro Plus
  - Text Import Wizard
- Excel
  - Freeze Top Row
  - Filter Data
  - Count
- Create a Sierra Review File from Excel
- Case study examples
  - CRC Shelf Reading List
  - 092 Past Practices
  - Deleting Bibliographic Records
  - Finding the absence of data
- Training Resources for Create Lists
  - Innovative Sierra Training Website
  - Institutional Training Documents
  - YouTube Videos



#IUG2021



# BGSU unique info

BGSU was on release Sierra 5.2 at the time this presentation was assembled

**Sierra**  
**Copyright © 1999-2021 Innovative Interfaces, Inc.**

**This computer program is protected by  
copyright law and international treaties.  
Unauthorized reproduction or distribution  
of this program is prohibited.**

**Software Release: Sierra 5.2.0\_18**  
**Release Date: September 2020**

BGSU is hosted by Innovative with Amazon Web Services

Information covered in this presentation should be available to all with:  
base Sierra implementation, no additional product from Innovative  
Access to Excel 2016 or Microsoft 365 Pro Plus

# BGSU unique info

- BGSU is a founding member of the [OhioLINK](#) consortium



**OhioLINK**

Connecting Libraries, Learning & Discovery

An **OH·TECH** Consortium Member

- Library and other academic partners work collaboratively with OhioLINK - the Ohio Library and Information Network to offer the greatest breadth and depth of resources to our patrons at substantial savings to the State of Ohio. OhioLINK consists of 120+ [member institutions](#).

OhioLINK also provides borrowing and lending to the Ohio public library network [SearchOhio](#)



[SearchOhio](#), together with its partners, makes over *16 million* items available to the communities served by the library systems

Both consortia partners use Innovative INN-Reach module to share physical resources.



#IUG2021



# BGSU unique info

- As a member of two statewide consortiums
  - We have bibliographic and item records we wish to contribute to central catalog
    - Main Stack Books; Main Stack Videos, etc.
  - We have bibliographic and item records we do not wish to contribute to the central catalog
    - Reserve Books; duplicative centrally purchase e-books, etc.
  - Staff are taught to use fixed fields to control this behavior and mistakes happen!

Bibliographic record: bcode3


- display all

d DELETE CODE

z local no central

s no local no central

(do not display to users)



Item record: icode2

- display all

z local no central

s no local no central

(do not display to users)

d do not use

(phasing out)





# BGSU unique info

- BGSU Jerome Library uses Summon as our Discovery Layer
  - Nightly we use Sierra scheduler to send bibliographic record updates to Summon (ProQuest)
  - We need to keep bibliographic records in our system after staff identify them to ensure that the delete record information is sent to discovery layer database
  - We achieve this with bibliographic bcode3 field:



- Staff are not allowed to delete bibliographic records
- Staff delete the item and all attached records, then change the bib bcode3 to d DELETE CODE
- I use Delete Records to bulk delete bibliographic records after their 2-week update embargo
- Use delete bib records with no attached records to ensure no accidentally deleted records
- It can take a long time to cleanup records from past practices

# Edit Existing Query

- Edit Existing Query

Highlight existing review file and use Search Records button

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]
25	bpcl dvd ICODE2 != z loc no central...	66	250	i	complete	strangm	03-01-2021 08:38AM

Warning popup appears, click Edit existing query button

bpcl dvd ICODE2 != z loc no central... 66 250 i

**Warning**

Warning: You are about to change the contents of this review file.  
How would you like to continue?

Start new query Re-run existing query **Edit existing query** Cancel

# Review Files

- Edit Existing Query

Popup window opens that lets you edit all the existing parameters!

Store Record Type: **ITEM i**

Range Start **i10000008** Stop **i78047006**

Classic Classic

Enhanced

Term	Operator	Type	Field	Condition	Value A	V
1		ITEM	ICODE2	not equal to	z	
2	AND	ITEM	LOCATION	equal to	mpav	

JSON

Edit Existing Query is a Sierra 5.0 feature that was one of the best Idea Lab enhancements of all time!



[Preserve browse query results](#) by Jeremy Goldstein 09/12/2018

Get an account, submit your ideas, and vote during the challenges!



# Review Files

- Saved Searches

- Save queries you have to repeat
- I use it for my discovery layer export file!
- We have our Sierra Scheduler product set up to use a saved search to export data to discovery layer

**Review Files**

- Saved Searches**
- Saved Sorts
- Saved Lists
- Saved Exports

**Saved Searches**

Store Record Type:

Review  Review file:

**Classic**

Te...	Operator	Type	Field	Condition	Value A	Value B
1		BIBLIOG...	UPDATED	greater than	01-16-2021	- -
2	AND	BIBLIOG...	BCODE3	equal to	-	
3	OR	BIBLIOG...	BCODE3	equal to	z	)
4	AND	ITEM	LOCATION	starts with	ff	
5	OR	ITEM	LOCATION	starts with	gg	
6	OR	ITEM	LOCATION	starts with	ma	

**Enhanced**

JSON

**Query**

Query	Query Name
4	summon updates 5/10/11 mis
5	Reserve Shorter Lead Time

# Review Files

- Saved Sorts

- We don't have any of these, but I can see where they would be useful for complicated sorts

<b>Review Files</b>	Saved Sorts		
<b>Saved Searches</b>	Sorting Fields		
<b>Saved Sorts</b>	<b>Line</b>	<b>Type</b>	<b>Field</b>
<b>Saved Lists</b>	1		
<b>Saved Exports</b>			

- Saved Lists

<b>Review Files</b>	Saved Lists		
<b>Saved Searches</b>	1	BIBLIOGRAPHIC	TITLE
<b>Saved Sorts</b>	2	BIBLIOGRAPHIC	RECORD #
<b>Saved Lists</b>	3	ORDER	RECORD #
<b>Saved Exports</b>			

Page heading GOBI INVOICE CLEAN-UP 8/22/20

List	List Name
1	Firelands weeding
2	In Transit Too Long - Firelands
3	GPOBI INVOICE CLEANUP





# Review Files

- Saved Exports
  - Save exports you have to repeat
  - Use this one extensively when it comes to exporting data into Excel!

Review Files	Saved Exports		
Saved Searches	<b>Fields to be exported</b>		
Saved Sorts	<b>Line</b>	<b>Type</b>	
Saved Lists	1	BIBLIOGRAPHIC	RECORD #
<b>Saved Exports</b>	2	BIBLIOGRAPHIC	LOCATION
	3	ITEM	RECORD #
	4	ITEM	LOCATION
	5	BIBLIOGRAPHIC	CAT DATE
	6	BIBLIOGRAPHIC	MAT TYPE
	7	ITEM	I TYPE
	8	BIBLIOGRAPHIC	BCODE3
	9	ITEM	ICODE2
	10	ITEM	STATUS
	Field delimiter		
	Text qualifier		
	<b>Export</b>	<b>Export Name</b>	
	24	mark 128 for excel	
	25	mark 264 for excel	
	26	CRC Fiction Inventory	
	27	Mark significant fields export 12/23/20	



# Review Files

- None of these (Saved Search, Saved Sorts, Saved Lists, Saved Exports) save the login and created date like Create Lists does.
- I tell my staff to include the date of save and their initials to assist with cleaning out saved searches.



## Idea Lab Open Challenge

- [Add create date; last use date; and login to Create Lists: Saved Search, Saved Sorts, Saved Lists, Saved Exports](#) to try and get this issue fixed!
- Make or use your account to give this idea a thumbs up so we can get this fixed!

# Save Search

- To save Searches, Sorts, Lists, Exports
- Highlight Review file and Search Records

File Edit View Go Tools Reports Admin Help

sierra FUNCTION Create Lists

Append Desktop Copy Empty Rename Own Release Cancel Show All

Review Files

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]
25	dvd icode2 not display to public	21	250	i	complete	strangm	03-12-2021 08:34AM
26		0	250		empty		

## Edit existing query

Warning

Warning: You are about to change the contents of this review file.  
How would you like to continue?

Start new query Re-run existing query Edit existing query Cancel



# Save Search

- To save a Search  
In Edit existing query Save As

Classic

Term	Operator	Type	Field	Condition	Value A	Value B
1	(	ITEM	LOCATION	equal to	mpav	
2	OR	ITEM	LOCATION	equal to	mmav	)
3	AND	ITEM	ICODE2	equal to	s	

(ITEM LOCATION equal to "mpav " OR ITEM LOCATION equal to "mmav ") AND ITEM ICODE2 eq

Search Use Existing Search Retrieve Saved Query Save **Save As** Close

- Name the Query and Save

Enter Query Name For Saving

Save Query As: **dvd icode2 not displaying to public**

or Choose from existing names:

- CRC Materials with Withdraw status
- gather bib deletes no attached records
- COUNTER journals
- summon updates 5/10/11 mjs
- Reserve Shorter Load Temp
- mjuu list training 12\_15\_20\_mjs
- Music Circ Probs
- Currfeed

Include Record Information

**Save** Cancel

# Access Saved Export

- To access a saved Search, Sort, List or Export
  - Highlight review file and hit button for function, Export Records for example

Review Files

All ▾ Search Records Sort Records List Records Import Records **Export Records** Show Records

Show Info

File ▲	Name	Current Records	Max Records
25	bpcl dvd ICODE2 != z loc no central ...	66	250

bpcl dvd ICODE2 != z loc no central training 12 20

Export ITEM Information

Fields to be exported

Line	Type	Field
1		

Append  
Insert  
Delete

Field delimiter: ,  
Text qualifier: "  
Repeated field delimiter: ;  
Maximum field length (0-1000): <none>

File: Browse

OK **Apply Saved Export** Save This Export Close

- A pop menu will appear, click on the Apply Saved Export button

# Access Saved Export

- To access a saved Search, Sort, List or Export
  - In the Retrieve Export menu that appears highlight desired saved export, click Select, and the properties are imported!

**Retrieve Export**

**Fields to be exported**

Line	Type	Field
1	BIBLIOGRAPHIC	RECORD #
2	BIBLIOGRAPHIC	LOCATION
3	ITEM	RECORD #
4	ITEM	LOCATION
5	BIBLIOGRAPHIC	CAT DATE
6	BIBLIOGRAPHIC	MAT TYPE
7	ITEM	I TYPE
8	BIBLIOGRAPHIC	BCODE3
9	ITEM	ICODE2
10	ITEM	STAT

Field delimiter: ~  
Text qualifier: "  
Repeated field delimiter: ;

**Export**

Export	Export Name
21	SO-Item 12/23/20
22	StdOrdClasSenItems
23	COUNTER journals
24	murf list training 12 16 20 tl
25	mark 264 for excel
26	CRC Fiction Inventory
27	Mark significant fields export 12/23/20
28	bib deletes 010220

Select Close

# ! MARC Tag Query

- You can find data by MARC Tag:
  - E-books are loaded from different providers
  - For remote access all URLs have our ezproxy.bgsu.edu prefix prepended
  - (we use 956 instead of 856 which was legacy OhioLINK programming to assist merging e-records)

[Catalog - BGSU University Libraries](#)

588			Description based on online resource; title from digital title page (viewed on January 05, 2021)
650	0		Racism in higher education zUnited States
650	0		African Americans xEducation (Higher) xSocial aspects
650	0		Educational equalization zUnited States
651	0		United States xRace relations
710	2		JSTOR (Organization)
776	0	8	iPrint version: aCole, Johnnetta B.. tRacism in American public life dCharlottesville : University of Virginia Press, 2021. (DLC) 2020024759
902			c
956	4	0	uhttps://ezproxy.bgsu.edu/login?url=https://www.jstor.org/stable/10.2307/j.ctv1bd4n09 zConnect to Resource

- Racism in American Public Life by Johnnetta B. Cole
- ISBN: 9780813945637|qelectronic book Bib Record #: b65166334





# ! MARC Tag Query

- Find data by MARC Tag
- Set Review File conditions:
  - Select field MARC Tag

Classic

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

BIBLIOGRAPHIC LOCATION equal to "nk " A  
" OR BIBLIOGRAPHIC BCODE3 equal to "z")

Search Use Existing Search Retrieve Save

0  
0  
0  
0

Select Me

MARC21 007	MARC21 008	Holder
Data Fields	MARC21 Leader	MARC21 006
x CONTINUES	z CONT'D BY	
w RELATED TO	g GOVT. DOC#	
l LC CTRL #	y MARC	
h LIB. HAS	l LOCATIONS	
k TOC DATA	8 HOLD	
<b>MARC Tag</b>	^ LINKED REC	

OK Cancel

# ! MARC Tag Query

- The MARC FIELD menu appears



- Enter the field you want to search on: 95640|u
- Click the OK button



- Condition: has; Value: ezproxy.bgsu.edu

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

# ! MARC Tag Query

- As of 3/1/21 BGSU has 507,316 electronic resource bib records with 956|u having ezproxy.bgsu.edu

The screenshot shows a library system interface. On the left is a sidebar with navigation options: Review Files, Saved Searches, Saved Sorts, Saved Lists, and Saved Exports. The main area displays a table of search results. The first row is highlighted in yellow and contains the following data:

File	Name	Current Records	Max Records	Type	Status	Login	Created [date/time]
144	iug bib eresrouces search	507316	555000	b	complete	strangm	03-01-2021 02:00PM

Below the table, a detailed query window titled "iug bib eresrouces search" is open. It shows the following configuration:

- Store Record Type: BIBLIOGRAPHIC b
- Range: Start b1000008, Stop b65171007
- Query Type: Classic
- Query Structure:
 

Term	Operator	Type	Field	Condition	Value A	Value B
1		BIBLIOGR...	LOCATION	equal to	nk	
2	AND	BIBLIOGR...	BCODE3	equal to	-	
3	OR	BIBLIOGR...	BCODE3	equal to	z	)
4	AND	BIBLIOGR...	MARC Tag ...	has	ezproxv.bgsu.edu	

- BGSU loads most of our URLs from the Serial Solutions knowledge base where we select e-resources for our discovery system holdings

# Review File: Previous record shortcut

Record	Description
507155b65166322	Timescales : thinking across ecological temporalities / Bethany Wiggin, Carolyn Fornoff , and P...
507156b65166334	Racism in American public life : a call to action / Johnnetta Betsch Cole
507157b65166346	Politics, culture, and the Irish American press, 1784-1963 / edited by Debra Reddin van Tuyl, ...

Bib Record · b65166334

File Edit View Go Tools Help

Save All View Edit Summary Export Print Close

b65166334

AUTHOR Cole, Johnnetta B., author  
TITLE Racism in American public life : a call to action / Johnnetta Betsch Cole  
LOCATIONS nk

Summary Summary

Rec... i78041260 View a All Delete Move Select

#	Record Number	DESCRIPTION
✓ 1	i78041260	LOCATION:nk VOLUME: BARCODE:

Selected 1 of 1 Attached Records

- Ctrl-] advances to the previous record up in review file

Record	Description
507155b65166322	Timescales : thinking across ecological temporalities / Bethany Wiggin, Carolyn Fornoff , and P...
507156b65166334	Racism in American public life : a call to action / Johnnetta Betsch Cole
507157b65166346	Politics, culture, and the Irish American press, 1784-1963 / edited by Debra Reddin van Tuyl, ...

Bib Record · b65166322

File Edit View Go Tools Help

Save All View Edit Summary Export Print Close

b65166322

TITLE Timescales : thinking across ecological temporalities / Bethany Wiggin, Carolyn Fornoff , and Patricia Eunji Kim, editors  
LOCATIONS nk





# Review File: Next record shortcut

Record	Description
507155b65166322	Timescales : thinking across ecological temporalities / Bethany Wiggin, Carolyn Fornoff , and P...
507156b65166334	Racism in American public life : a call to action / Johnnetta Betsch Cole
507157b65166346	Politics, culture, and the Irish American press, 1784-1963 / edited by Debra Reddin van Tuyll, ...

The screenshot shows a software window titled "Bib Record · b65166334" with a menu bar (File, Edit, View, Go, Tools, Help) and a toolbar. The main area displays metadata for record b65166334: AUTHOR Cole, Johnnetta B., author; TITLE Racism in American public life : a call to action / Johnnetta Betsch Cole; LOCATIONS nk. Below this is a "Summary" section with a "View" dropdown set to "All" and buttons for "Delete", "Save", and "Select". A table below shows a list of records with columns for "#", "Record Number", and "DESCRIPTION". The first record is selected, showing record number 178041260 and location nk. A small orange button labeled "Records with no" is visible on the right.

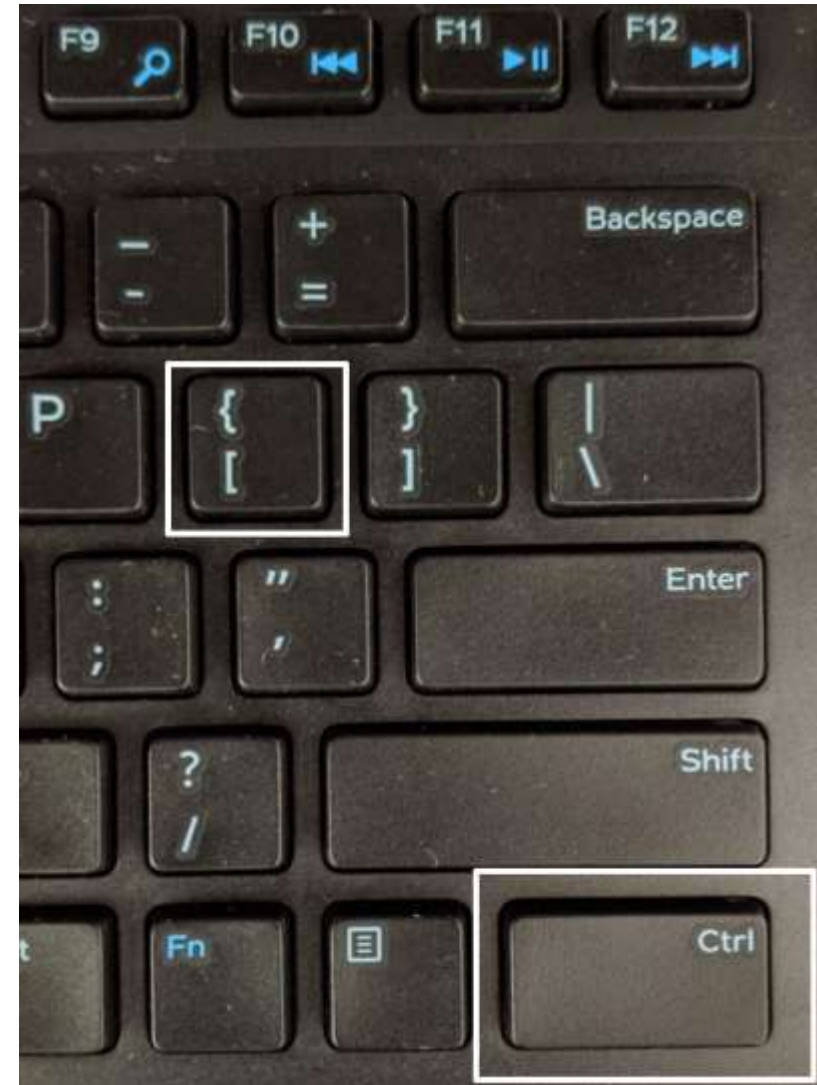
#	Record Number	DESCRIPTION
✓ 1	178041260	LOCATION:nk VOLUME: BARCODE:

- Ctrl-[ advances to the next record down in review file

Record	Description
507155b65166322	Timescales : thinking across ecological temporalities / Bethany Wiggin, Carolyn Fornoff , and P...
507156b65166334	Racism in American public life : a call to action / Johnnetta Betsch Cole
507157b65166346	Politics, culture, and the Irish American press, 1784-1963 / edited by Debra Reddin van Tuyll, ...

The screenshot shows a software window titled "Bib Record · b65166346" with a menu bar (File, Edit, View, Go, Tools, Help) and a toolbar. The main area displays metadata for record b65166346: TITLE Politics, culture, and the Irish American press, 1784-1963 / edited by Debra Reddin van Tuyll, Mark O'Brien, and Marcel Broersma; LOCATIONS nk. A small orange button labeled "Records with no" is visible on the right.



# Exporting Records

- Case study: check DVDs in mmav Main A/V and mpav Brown Popular Culture Library
- Review File: Item
  - Type: ITEM, Field: LOCATION, Condition: equal to, Value: mpav
  - OR Type: ITEM, Field: LOCATION, Condition: equal to, Value: mmav

DVD's for public display

: ITEM i

Start i10000008 Stop i78048291

Classic

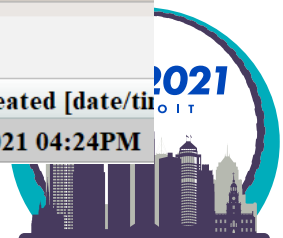
Term	Operator	Type	Field	Condition	Value A
1		ITEM	LOCATION	equal to	mpav
2	OR	ITEM	LOCATION	equal to	mmav

- Highlight Review File

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]
99	DVD's items display to public	4717	5000	i	complete	strangm	03-01-2021 04:24PM



# Exporting Records

Create Lists Training

Export BIBLIOGRAPHIC Information

Fields to be exported

Line	Type	Field
1		

Append

Insert

Delete

Field delimiter

Text qualifier

Repeated field delimiter

Maximum field length (0-1000)

File: Browse

OK Apply Saved Export Save This Export Close

- “Fields to be exported” table
- Enter Types and Fields to be exported to a CSV file
  - Double-click in the Type cell and choose a record type from the pop-up window.
  - Double-click in the Field cell and choose a field from the pop-up window.
  - Choose the Append button to add another field to be listed. Alternatively, choose the Insert button to add a field before the selected field
  - An almost unlimited number of fields may be selected
  - The fields will be listed in the order in which they appear in the “Fields to be exported” table.
- I prefer to export more fields rather than less so I can hide, sort, and filter in Excel. More data makes it easier to find outlier data that needs to be fixed.  
(Exceptionally large review files, such as 50,000+ records with a lot of fields can take a while to download.)
- I always include the item record # or bib record # in the fields I export so I can import the data back in

# Exporting Records: Fields to export

- Item record fields I find useful:

The screenshot shows a 'Select Me' dialog box with a 'Data Fields' tab. It is divided into 'Fixed Fields' and 'Variable Fields' sections. Several fields are highlighted with blue boxes, indicating they are selected for export.

Field ID	Field Name
58	COPY #
61	I TYPE
68	LCHKIN
74	IUSE3
79	LOCATION
83	CREATED
84	UPDATED
85	REVISIONS
c	CALL #
1	LOCATIONS
b	BARCODE

Other fields visible in the dialog include: 59 ICODE1, 60 ICODE2, 62 PRICE, 63 OUT DATE, 64 OUT LOC, 65 DUE DATE, 66 PATRON#, 67 LPATRON, 70 IN LOC, 71 # RENEWALS, 72 # OVERDUE, 73 ODU DATE, 75 RECAL DATE, 76 TOT CHKOUT, 77 TOT RENEW, 78 LOU DATE, 87 LOANRULE, 88 STATUS, 93 INTL USE, 94 COPY USE, 97 IMESSAGE, 108 OPACMSG, 109 YTDCIRC, 110 LYRCIRC, 81 RECORD #.



# Exporting Records: Fields to export

- Bibliographic record fields I find useful:

Select Me

Data Fields | MARC21 Leader | MARC21 006 | MARC21 007 | MARC21 008

All Fields  
all

Fixed Fields

24 LANG	25 SKIP	26 LOCATION	28 CAT DATE
29 BIB LVL	30 MAT TYPE	31 BCODE3	89 COUNTRY
81 RECORD #	83 CREATED	84 UPDATED	85 REVISIONS

Variable Fields

0 OCLC NO	1 ISN/STD NO	2 CALL #	3 AUTHOR	4 TITLE
5 EDITION	6 IMPRINT	7 Description	8 SERIES	9 NOTE
10 SUBJECT	11 GENRE/Form	12 ALT AUTHOR	13 ALT TITLE	14 CONTINUES
15 CONT'D BY	16 RELATED TO	17 GOVT. DOC#	18 LC CTRL #	19 MARC
20 LIB. HAS	21 LOCATIONS	22 TOC DATA	23 HOLD	24 MARC Tag

OK Cancel

# Exporting Records: Delimiter

Field delimiter: Standard delimiter for a CSV file is a “,” comma

Since a comma is frequently used in Titles I change my delimiter to:

“~” tilde which is rarely used in a title or elsewhere

“@” at-sign is another delimiter I sometime use

Click Field delimiter button and the Choose Delimiter popup appears

DVD's items display to public 4717

DVD's items display to public

Export ITEM Information

Fields to be exported

Line	Type	Field
1		

Append  
Insert  
Delete

Field delimiter ,  
Text qualifier "  
Repeated field delimiter :  
Maximum field length (0-1000) <none>

File: Browse

OK Apply Saved Export Save This Export Close

Choose Delimiter

Control character (1-127)

ASCII character

None

OK Cancel

In the ASCII character box, use the keyboard to enter the character "~" tilde

Choose Delimiter

Control character (1-127)

ASCII character ~

None

OK Cancel



# Exporting Records: Saved Export

- Use the Apply Saved Export button
- Select the "Mark significant fields export 12/23/20" row
- Use the Select button

The screenshot displays a library system interface with a top navigation bar containing buttons for 'Search Records', 'Sort Records', 'List Records', 'Import Records', 'Export Records', 'Show Records', and 'Show'. Below this, a table shows 'DVD's items display to public' with 4717 current records. A 'Retrieve Export' dialog box is open, showing a list of fields to be exported:

Line	Type	Field
1	BIBLIOGRAPHIC	RECORD #
2	BIBLIOGRAPHIC	LOCATION
3	ITEM	RECORD #
4	ITEM	LOCATION
5	BIBLIOGRAPHIC	CAT DATE
6	BIBLIOGRAPHIC	MAT TYPE
7	ITEM	I TYPE
8	BIBLIOGRAPHIC	BCODE3
9	ITEM	ICODE2

Below the table are input fields for 'Field delimiter', 'Text qualifier', and 'Repeated field delimiter'. At the bottom of the dialog, a list of saved exports is shown:

Export	Export Name
21	SO-ITEM RECORDS 202010
22	StdOrdClasSenItems
23	COUNTER journals
24	murf list training 12 16 20 tl
25	mark 264 for excel
26	CRC Fiction Inventory
27	Mark significant fields export 12/23/20
28	bib deletes 010220

The 'Mark significant fields export 12/23/20' row is highlighted in yellow. A 'Select' button is also highlighted in yellow at the bottom of the dialog. In the background, another dialog box titled 'DVD's items display to public' is visible, showing 'Export ITEM Information' with a table of fields to be exported and buttons for 'Append', 'Insert', and 'Delete'. Below this table are input fields for 'Field delimiter', 'Text qualifier', 'Repeated field delimiter', and 'Maximum field length (0-1000)'. At the bottom of this dialog, the 'Apply Saved Export' button is highlighted in yellow.





# Exporting Records

- Use the Browse button to choose file name and directory and then click Save

The screenshot shows the 'Export ITEM Information' dialog box with the 'Fields to be exported' table and the 'Choose output file' dialog box open. The 'Choose output file' dialog box shows the 'Save In' location as 'Documents' and the 'File Name' as 'DVD's items display to public'. The 'Files of Type' is set to 'Text Files (\*.txt)'. The 'Save' button is highlighted in yellow.

Line	Type	Field
1	h	RECORD #
2	BIBLIOGRAPH...	LOCATION
3	ITEM	RECORD #
4	ITEM	LOCATION
5	BIBLIOGRAPH...	CAT DATE
6	BIBLIOGRAPH...	MAT TYPE
7	ITEM	I TYPE
8	BIBLIOGRAPH...	RCODE?

Field delimiter: ~  
Text qualifier: "  
Repeated field delimiter: ;  
Maximum field length (0-1000): <none>

File:  **Browse**

Choose output file

Save In: Documents

- 856changesjuly2017 aV
- 20100301.txt bit
- aIUGPRESENTATION bit
- Annual Equipment Request bI

File Name:

Files of Type: Text Files (\*.txt)

**Save** Cancel

The screenshot shows the 'Export ITEM Information' dialog box with the 'Fields to be exported' table and the 'Choose output file' dialog box open. The 'Choose output file' dialog box shows the 'Save In' location as 'Documents' and the 'File Name' as 'DVD's items display to public'. The 'Files of Type' is set to 'Text Files (\*.txt)'. The 'Save' button is highlighted in yellow.

Line	Type	Field
1	h	RECORD #
2	BIBLIOGRAPH...	LOCATION
3	ITEM	RECORD #
4	ITEM	LOCATION
5	BIBLIOGRAPH...	CAT DATE
6	BIBLIOGRAPH...	MAT TYPE
7	ITEM	I TYPE
8	BIBLIOGRAPH...	RCODE?

Field delimiter: ~  
Text qualifier: "  
Repeated field delimiter: ;  
Maximum field length (0-1000): <none>

File:  **Browse**

Choose output file

Save In: Documents

- 856changesjuly2017 aV
- 20100301.txt bit
- aIUGPRESENTATION bit
- Annual Equipment Request bI

File Name:

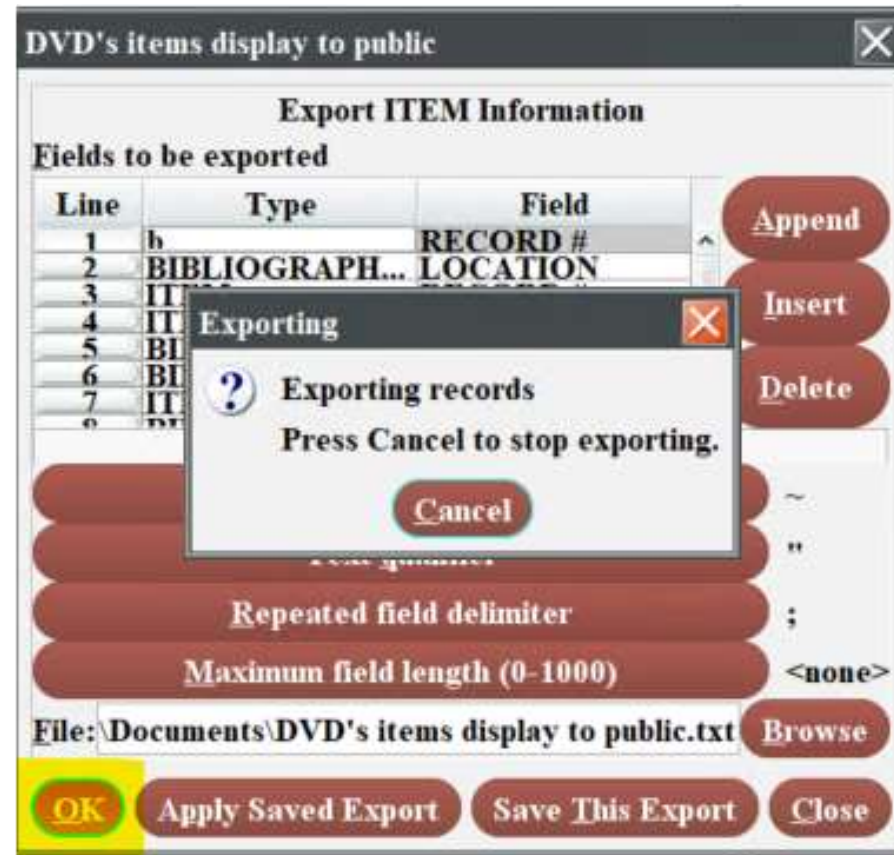
Files of Type: Text Files (\*.txt)

**Save** Cancel



# Exporting Records

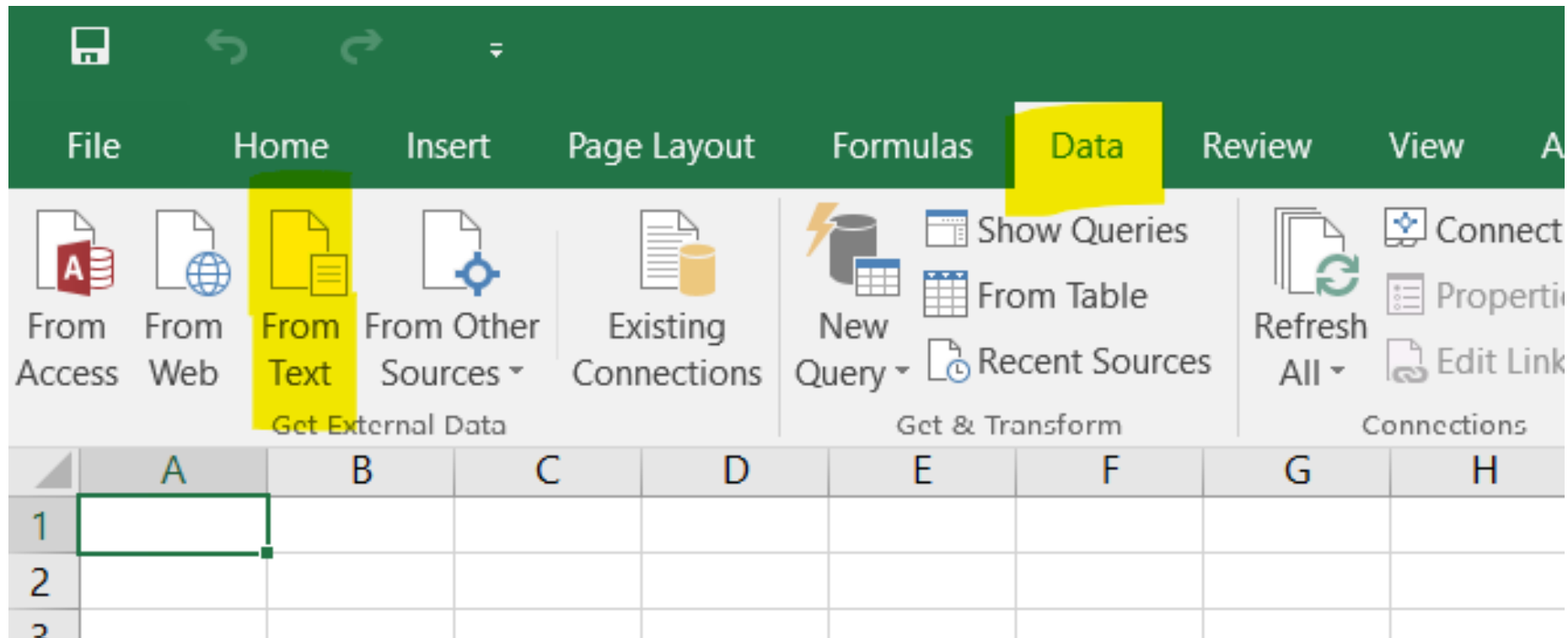
- Click the OK button, you will see the Exporting popup until the export is finished



- The Exporting popup with the Cancel option will disappear when the export is completed

# Excel Import: Excel 2016

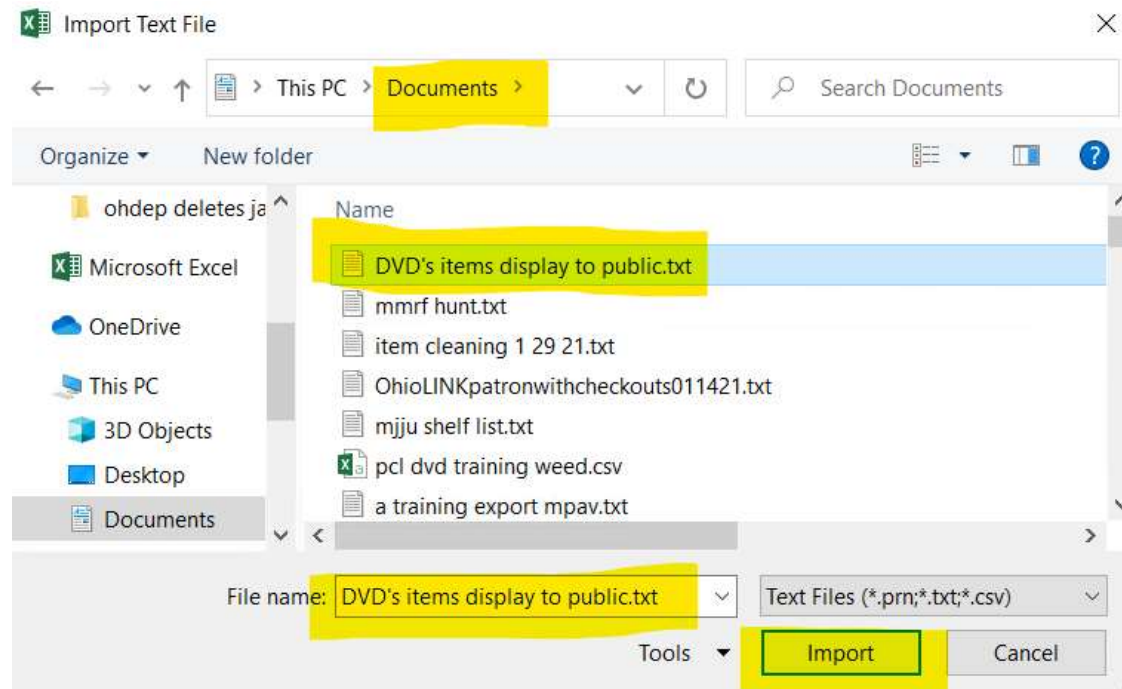
- Excel 2016
  - Put cursor in cell A1
  - Choose the Data from the ribbon row
  - Choose From Text



If using Excel 365 Pro Plus advance two slides

# Excel Import: Excel 2016

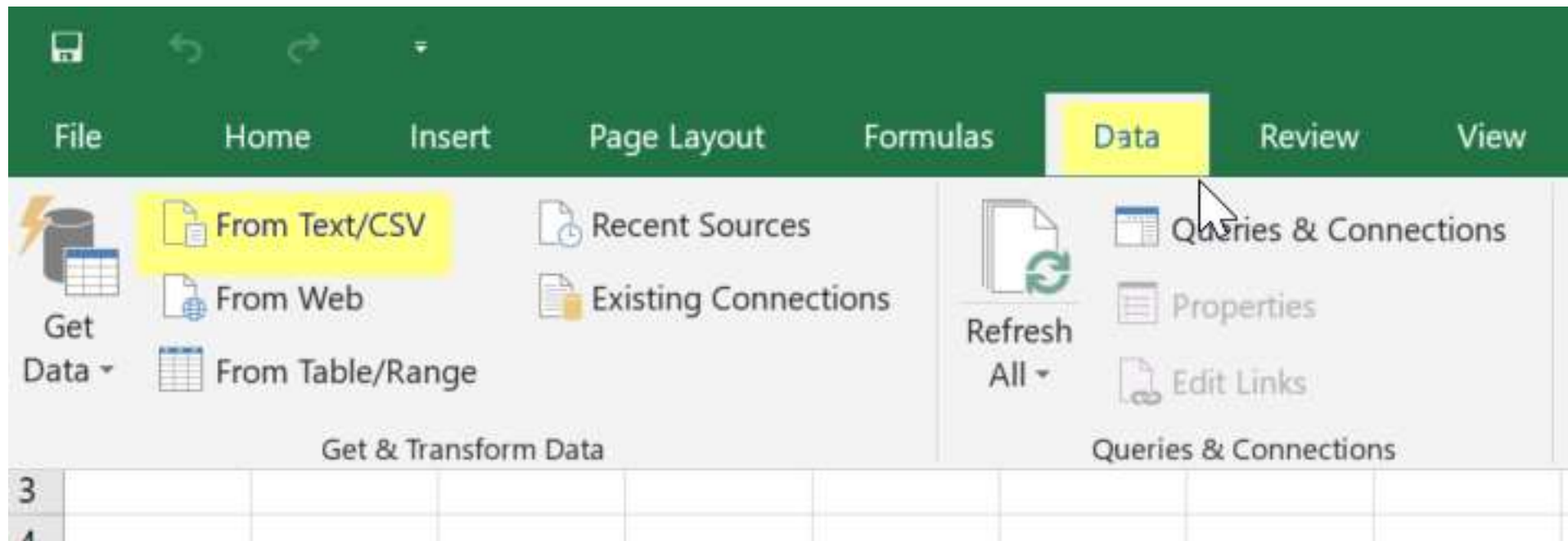
- Import Text File popup
  - Go to directory where you exported from Sierra
  - Highlight the file name and then use the Import button



- Excell2016 users skip 4 slides and go to Text Import Wizzard

# Excel Import: Microsoft Office 365 Pro Plus

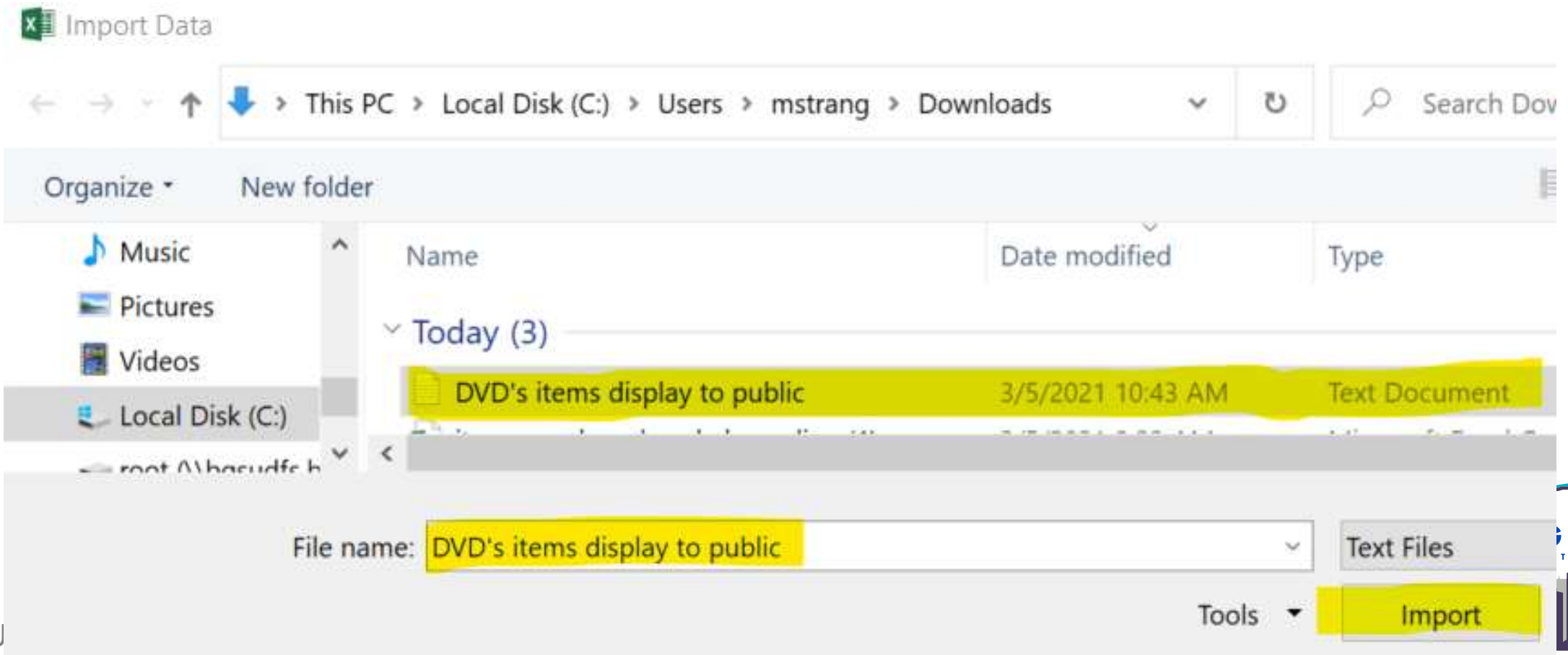
- Click on the Data ribbon
- Choose the From Text/CSV button



- If using Excel 2016 advance 4 slides

# Excel Import: Microsoft Office 365 Pro Plus

- Go to the directory where you saved the CSV
- Highlight the file name
- Use the Import button



# Excel Import: Microsoft Office 365 Pro Plus

- You have to load the data into a single column first and then clean it up ☹️

DVD's items display to public.txt

File Origin  
1252: Western European (Windows) ▾

Column1
"RECORD #(BIBLIO)"~"LOCATION"~"RECORD #(ITEM)"~...
"b22765529"~"dq,mm"~"i29802830"~"mmav"~"09-16...
"b22765542"~"dq,mm"~"i29802866"~"mmav"~"09-16...
"b23534515"~"dq,mm"~"i30905965"~"mmav"~"07-22...
"b23925942"~"dq,mm"~"i31649671"~"mmav"~"02-29...
"b24221508"~"dq,mm"~"i32203500"~"mmav"~"08-15...
"b2432419x"~"dq,mm"~"i32622636"~"mmav"~"01-17...
"b25176353"~"dq,mm"~"i3343783x"~"mmav"~"10-19...
"b25214639"~"dq,mm"~"i33529450"~"mmav"~"11-30...
"b25214627"~"dq,mm"~"i33595057"~"mmav"~"01-04...
"b25608629"~"dq,mm"~"i34093126"~"mmav"~"06-24...
"b2557324x"~"dq,mm"~"i34109948"~"mmav"~"06-27...
"b25938368"~"dq,mm"~"i3477953x"~"mmav"~"02-11...
"b26104453"~"dq,mm"~"i34965439"~"mmav"~"04-04...
"b26166422"~"dq,mm"~"i3514676x"~"mmav"~"06-02...
"b2616937x"~"dq,mm"~"i35198722"~"mmav"~"06-18...
"b26135401"~"dq,mm"~"i35212780"~"mmav"~"06-23...
"b26141772"~"dq,mm"~"i35236437"~"mmav"~"06-28...
"b26179283"~"dq,mm"~"i35323395"~"mmav"~"07-16...
"b26141279"~"dq,mm"~"i3543174x"~"mmav"~"08-13...

**i** The data in the preview has been truncated due to size limits.

Load ▾ Edit Cancel

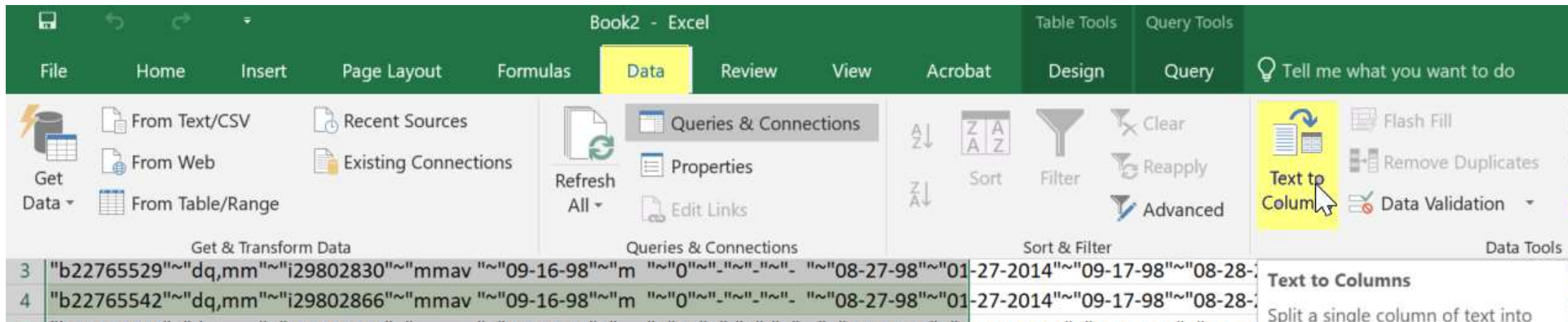


# Excel Import: Microsoft Office 365 Pro Plus

Data Imports into a single column if you use any delimiter but ",", for your CSV file

	A	B
1	Column1	
2	"RECORD #(BIBLIO)"~"LOCATION"~"RECORD #(ITEM)"~"LOCATION"~"CAT DATE"~"MAT TYPE"~"I TYPE"~"BCO	
3	"b22765529"~"dq,mm"~"i29802830"~"mmav "~"09-16-98"~"m "~"0"~"_"~"_"~"_"~"_"~"08-27-98"~"01-27-2014"~"	
4	"b22765542"~"dq,mm"~"i29802866"~"mmav "~"09-16-98"~"m "~"0"~"_"~"_"~"_"~"_"~"08-27-98"~"01-27-2014"~"	

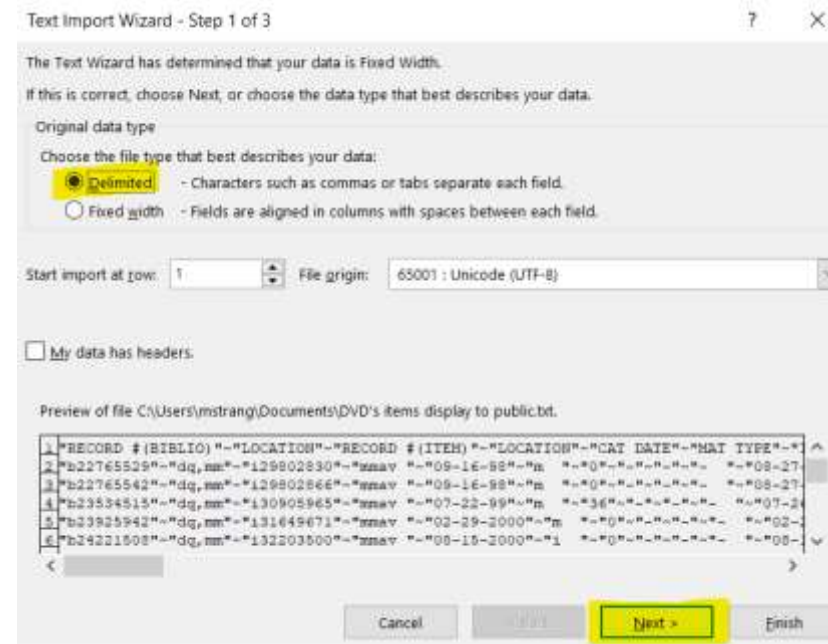
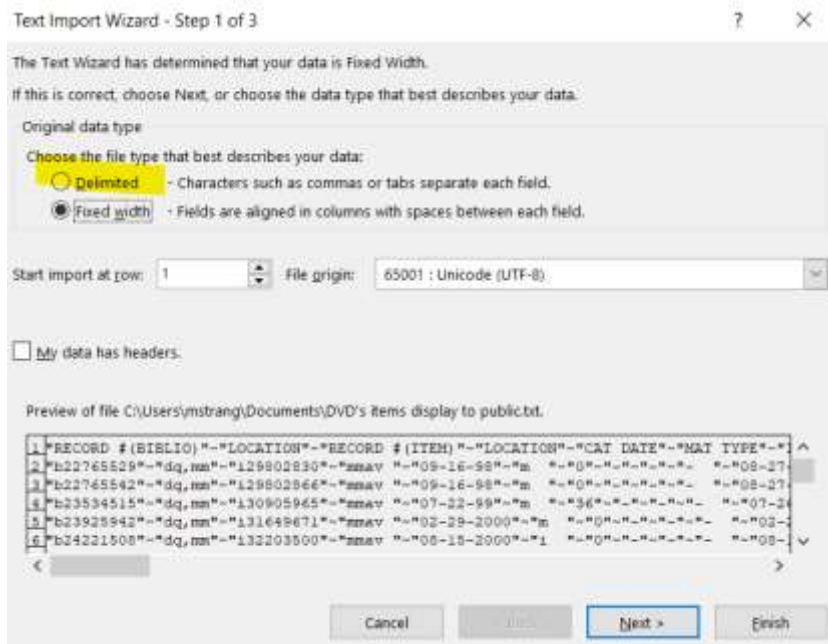
Under the Data ribbon click the “Text to Columns” button



(this has the same appearance and functionality as Text Import Wizard in the next slides)

# Excel Import: Text Import Wizard

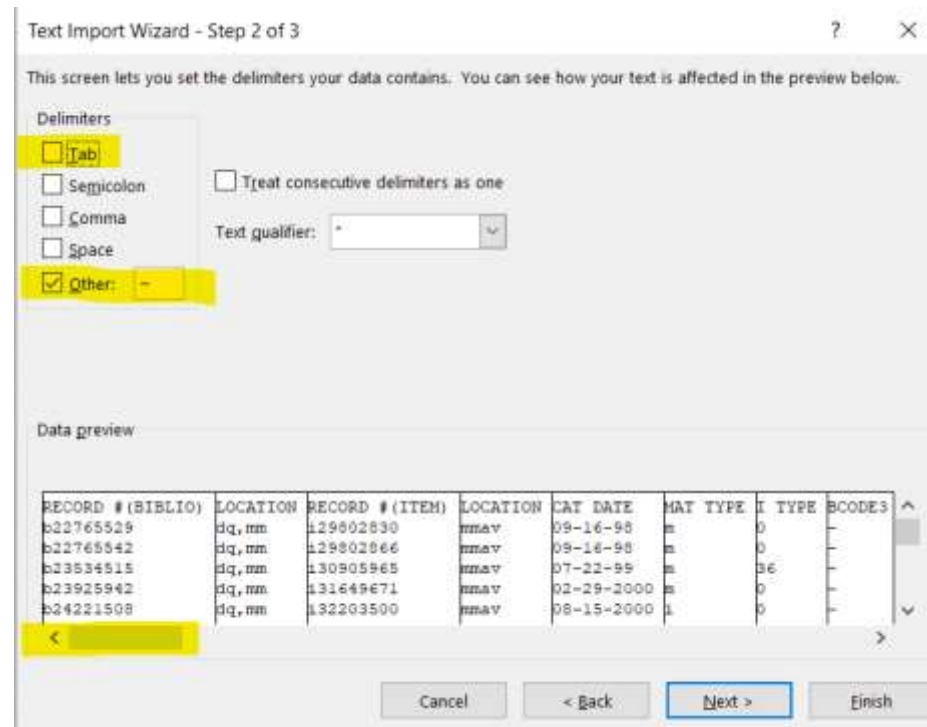
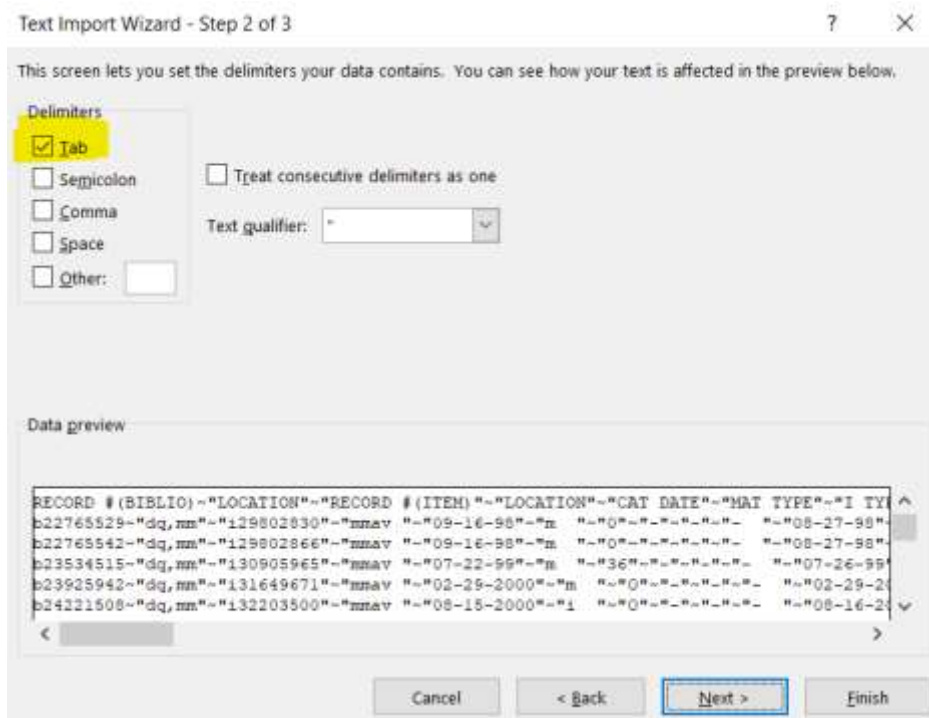
- Text Import Wizard – Step 1 of 3 popup
  - Change from “Fixed width”
  - Click on the "Delimited" option
  - Click Next





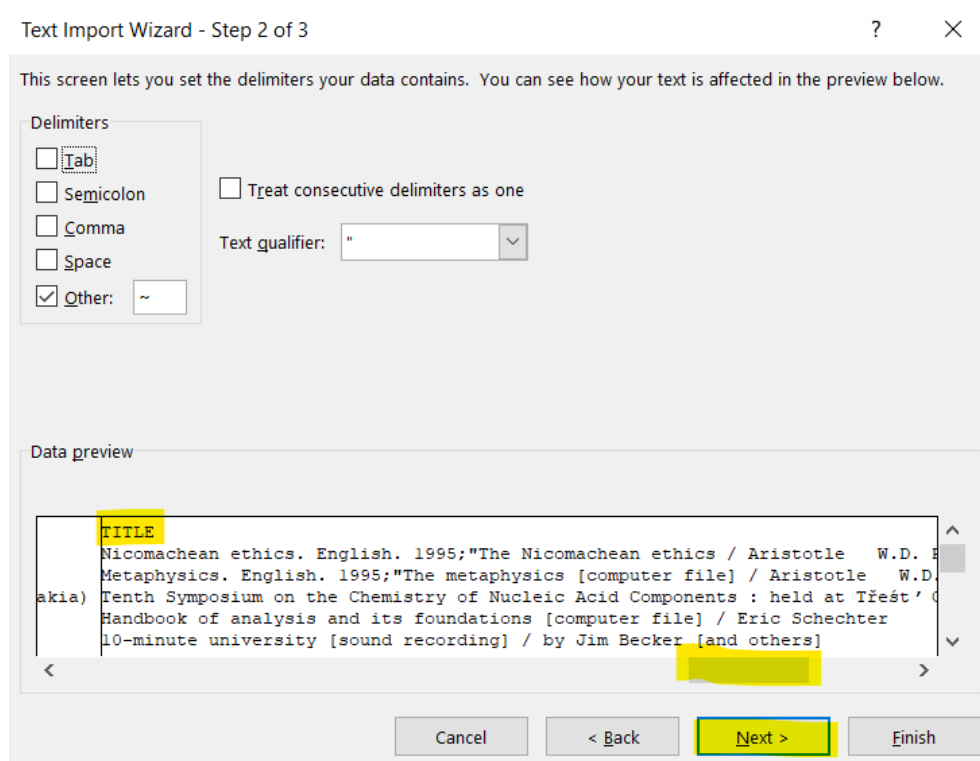
# Excel Import: Text Import Wizard

- Text Import Wizard – Step 2 of 3 popup
  - Uncheck the “Tab” box
  - Click “Other”
  - Enter tilde “~”
  - Use the scrollbar to see how your data lines up, title is at the end



# Excel Import: Text Import Wizard

- Text Import Wizard – Step 2 of 3 popup
  - Use the scrollbar to see how your data lines up, title is at the end
  - Click Next



# Excel Import: Text Import Wizard

- Text Import Wizard – Step 3 of 3 popup
  - Change date columns from General to Date
  - Change columns with leading 0s to Text (no example in data set)
  - Highlight the CAT DATE column
  - Click the Date option
  - Click on Finish

Text Import Wizard - Step 3 of 3

This screen lets you select each column and set the Data Format.

Column data format

General  
 Text  
 Date: MDY  
 Do not import column (skip)

'General' converts numeric values to numbers, date values to dates, and all remaining values to text.

Advanced...

Data preview

General	General	General	General	General	General	General	General
RECORD # (BIBLIO)	LOCATION	RECORD # (ITEM)	LOCATION	CAT DATE	MAT TYPE	I TYPE	BCODE3
b22765529	dq, mm	i29802830	mmav	09-16-98	m	0	-
b22765542	dq, mm	i29802866	mmav	09-16-98	m	0	-
b23534515	dq, mm	i30905965	mmav	07-22-99	m	36	-
b23925942	dq, mm	i31649671	mmav	02-29-2000	m	0	-
b24221508	dq, mm	i32203500	mmav	08-15-2000	i	0	-

Cancel < Back Next > Finish

Text Import Wizard - Step 3 of 3

This screen lets you select each column and set the Data Format.

Column data format

General  
 Text  
 Date: MDY  
 Do not import column (skip)

'General' converts numeric values to numbers, date values to dates, and all remaining values to text.

Advanced...

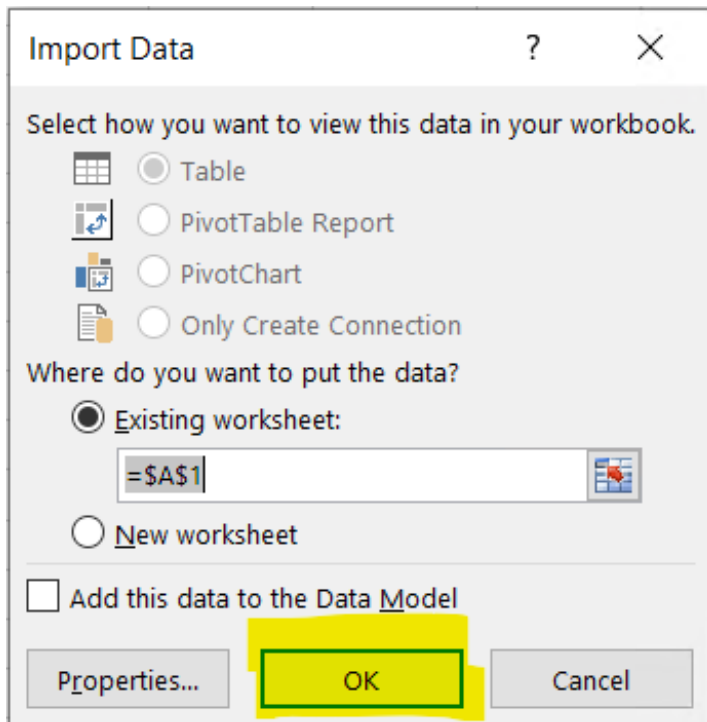
Data preview

General	General	General	General	MDY	General	General	General
RECORD # (BIBLIO)	LOCATION	RECORD # (ITEM)	LOCATION	CAT DATE	MAT TYPE	I TYPE	BCODE3
b22765529	dq, mm	i29802830	mmav	09-16-98	m	0	-
b22765542	dq, mm	i29802866	mmav	09-16-98	m	0	-
b23534515	dq, mm	i30905965	mmav	07-22-99	m	36	-
b23925942	dq, mm	i31649671	mmav	02-29-2000	m	0	-
b24221508	dq, mm	i32203500	mmav	08-15-2000	i	0	-

Cancel < Back Next > Finish

# Excel Import: Text Import Wizard

- Import Data popup
- Ensure it will import into cell A1 with first line
- Click OK



# Excel Import

## Example of columns created

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	RECORD #(BIB)	LOCATIC	RECORD #(ITEM)	LOCATION	CAT DATE	MAT TYPE	I TYPE	BCODE3	ICODE2	STATUS	CREATED(BIB)	UPDATED(BIB)	CREATED(ITE)	UPDATED(ITE)
2	b22765529	dq,mm	i29802830	mmav	9/16/1998	m	0	-	-	-	8/27/1998	1/27/2014	9/17/1998	8/28/2020
3	b22765542	dq,mm	i29802866	mmav	9/16/1998	m	0	-	-	-	8/27/1998	1/27/2014	9/17/1998	8/28/2020
4	b23534515	dq,mm	i30905965	mmav	7/22/1999	m	36	-	-	-	7/26/1999	1/27/2014	7/26/1999	6/12/2017
5	b23925942	dq,mm	i31649671	mmav	2/29/2000	m	0	-	-	-	2/29/2000	1/27/2014	2/29/2000	6/13/2017

O	P	Q	R	S	T	U	V	W	X	Y
LCHKIN	IUSE3	T CHKOUT	T RENEW	LOUTDATE	YTDCIRC	LYRCIRC	CALL #(ITEM)	BARCODE	OCLC NO	EDITION
8/7/2018 14:19	0	7	1	7/27/2018 13:05	0	0	a/v B430.A5 R67 1995	A11346055038	34647656	
8/7/2018 14:19	0	3	0	7/27/2018 13:05	0	0	a/v B434.A5 R6 1995	A11346055152	34647683	
11/25/2002 14:11	0	1	0	11/13/2002 14:00	0	0	a/v QD433.A1S93 1996	A11391500474	36968191	

Z	AA	AB
IMPRINT	AUTHOR	TITLE
New York, NY : Fordham University Press, c1995	Aristotle	Nicomachean ethics. English. 1995;"The Nicomachean ethics / Aristotle W.D. Ross, translator"
New York, NY : Fordham University Press, c1995	Aristotle	Metaphysics. English. 1995;"The metaphysics [computer file] / Aristotle W.D. Ross, translator"
[London, UK : Academic Press], 1996	Symposium on the Chemistry	Tenth Symposium on the Chemistry of Nucleic Acid Components : held at Třešť Castle, Czech Republic,
Orlando, FL : Academic Press, c1999	Schechter, Eric, 1950-	Handbook of analysis and its foundations [computer file] / Eric Schechter





# Excel: Freeze Top Row

- Highlight row 1
- Choose the “View” ribbon across the top of Excel
- Under the Window section choose “Freeze Panes”
- Choose “Freeze Top Row”

The screenshot shows the Microsoft Excel interface with the 'View' ribbon selected. The 'Freeze Panes' dropdown menu is open, and the 'Freeze Top Row' option is highlighted. The spreadsheet below shows a table with columns A through N and rows 1 through 7. Row 1 is highlighted in yellow.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	RECORD #(BIB)	LOCATIC	RECORD #(ITEM)	LOCATION	CAT DATE	MAT TYPE	I TYPE	BCODE3	ICC					UPDATED(ITEI
2	b22765529	dq,mm	i29802830	mmav	9/16/1998	m	0	-	-					8/28/2020
3	b22765542	dq,mm	i29802866	mmav	9/16/1998	m	0	-	-					8/28/2020
4	b23534515	dq,mm	i30905965	mmav	7/22/1999	m	36	-	-					6/12/2017
5	b23925942	dq,mm	i31649671	mmav	2/29/2000	m	0	-	-					6/13/2017
6	b24221508	dq,mm	i32203500	mmav	8/15/2000	i	0	-	-					7/16/2018
7	b2432419x	dq,mm	i32622636	mmav	1/17/2001	m	49	-	-					7/30/2010

# Excel: Filter Data

- Highlight row 1
- Choose the “Home” ribbon across the top of Excel
- Under the Window section choose “Sort & Filter”
- Choose “Filter”

The screenshot shows the Excel Home ribbon with the 'Sort & Filter' group expanded. The 'Filter' button is highlighted in yellow. Below the ribbon, a table is visible with the following columns: MAT TYPE, I TYPE, BCODE3, ICODE2, STATUS, CREATED(BIB), UPDATED(BIB), CREATED(ITE), UPDATED(ITE), LCHKIN, IUUSE3, T CHKOUT, T RENEW, LOUUPDATE. The first row of data is highlighted in yellow.

MAT TYPE	I TYPE	BCODE3	ICODE2	STATUS	CREATED(BIB)	UPDATED(BIB)	CREATED(ITE)	UPDATED(ITE)	LCHKIN	IUUSE3	T CHKOUT	T RENEW	LOUUPDATE
n	0	-	-	-	8/27/1998	1/27/2014	9/17/1998	8/28/2020	8/7/2018 14:19	0	7	1	7/27/2018 13:05
n	0	-	-	-	8/27/1998	1/27/2014	9/17/1998	8/28/2020	8/7/2018 14:19	0	3	0	7/27/2018 13:05
n	36	-	-	-	7/26/1999	1/27/2014	7/26/1999	6/12/2017	11/25/2002 14:11	0	1	0	11/13/2002 14:00
n	0	-	-	-	2/29/2000	1/27/2014	2/29/2000	6/13/2017	3/27/2015 11:46	0	3	0	9/4/2008 18:14
	0	-	-	-	8/16/2000	8/19/2016	8/16/2000	7/16/2018	4/3/2017 14:22	0	5	0	3/10/2017 11:56

	A	B	C	D	E	F	G	H	I	J	K
1	RECORD #(I	LOCA	RECORD #(ITEM	LOCATIO	CAT DATE	MAT TY	I TY	BCOD	ICOD	STAT	CREATED(I
2	b22765529	dq,mm	i29802830	mmav	9/16/1998	m	0	-	-	-	8/27/1998
3	b22765542	dq,mm	i29802866	mmav	9/16/1998	m	0	-	-	-	8/27/1998
4	b23534515	dq,mm	i30905965	mmav	7/22/1999	m	36	-	-	-	7/26/1999
5	b23925942	dq,mm	i31649671	mmav	2/29/2000	m	0	-	-	-	2/29/2000



#IUG2



# Excel: Filter Data

- Click down arrow in the location column  
(we know this is item location from where we put that field in the Sierra export menu)

	A	B	C	D	E	F	G
1	RECORD #(ITEM)	LOCA	RECORD #(ITEM)	LOCATIC	CAT DATE	MAT TY	I TY
2	b22765529	dq,mm	i29802830	mmav	9/16/1998	m	0
3	b22765542	dq,mm	i29802866	mmav	9/16/1998	m	0
4	b23534515	dq,mm	i30905965	mmav	7/22/1999	m	36
5	b23925942	dq,mm	i31649671	mmav	2/29/2000	m	0

b3258040

	A	B	C	D
1	RECORD #(ITEM)	LOCA	RECORD #(ITEM)	LOCATIC
2	b227655	Sort A to Z		
3	b227655	Sort Z to A		
4	b235345	Sort by Color		
5	b239259	Clear Filter From "LOCATION"		
6	b242215	Filter by Color		
7	b243241	Text Filters		
8	b251763	Search		
9	b252146			
10	b252146			
11	b256086	<input checked="" type="checkbox"/> (Select All)		
12	b255732	<input checked="" type="checkbox"/> b3258040x		
13	b259383	<input checked="" type="checkbox"/> mmav		
14	b261044	<input checked="" type="checkbox"/> mpav		
15	b261664			
16	b261693			
17	b261354			
18	b261417			
19	b261792			
20	b261412			

The filter choices are:  
Select All

mmav Main Stacks A/V

mpav Popular Culture Library A/V

Unclick all boxes except b3258040x  
so we can see what is up with that data

# Excel: Filter Data

1	RECORD #(BIBLI	LOCATION	RECORD #(ITEM	LOCATIO	CAT DATE	MAT TYPE	I TY	BCOD	ICOD	STAT	CREATED(I
2175	b32580368	b32580381	b32580393	b3258040x	b32580411	dq,mm,rq,mp	dq,mp	dq,mp	dq,mp	dq,mp	i43515678

The result is 3 bibliographic records numbers and then the item record number under created.

Let's look it up in Sierra SDA Catalog Function:

The screenshot shows the Sierra SDA Catalog Function interface. The search criteria is RECORD # i43515678. The record details for item i43515678 are as follows:

**Record Information:**  
 b32580368  
 TITLE Shadows [videorecording] / Faces Distribution Corporation ; produced by Maurice McEndree ; associate producer, Seymour Cassel ; directed by John Cassavetes  
 LOCATIONS dq , mm . rq . mp  
 Not checked out and Shorter Loan  
 i43515678 Last Updated: 01-17-2020 Created: 01-05-2012 Revisions: 19

COPY #	1	LCHKIN	06-28-2016 04:37PM	LOCATION	mpav - Pop Cult DVD
ICODE1	0	IN LOC	403	LOANRULE	0
ICODE2	z local no cent	# RENEWALS	0	STATUS	c Shorter Loan
I TYPE	36 dvd	# OVERDUE	0	INTL USE	1
PRICE	\$0.00	ODUE DATE	- -	COPY USE	0
OUT DATE	- -	IUSE3	0	IMESSAGE	- NO MESSAGE
OUT LOC	403	RECAL DATE	- -	OPACMSG	-
DUE DATE	- -	TOT CHKOUT	3	YTDCIRC	0
PATRON#	0	TOT RENEW	0	LYRCIRC	0
LPATRON	0	LOUTDATE	06-21-2016 02:49PM	Sticky Status	c Shorter Loan

**Barcode and Additional Info:**  
 c 099 ppopaDVD 1703  
 v Discs 1-6 Booklet  
 b A11391143523

**Also linked to Bib record(s):**  
 b32580381, b32580393, b3258040x, b32580411

The data is OK because we see the item is linked to 3 bibliographic records which is an acceptable local practice.



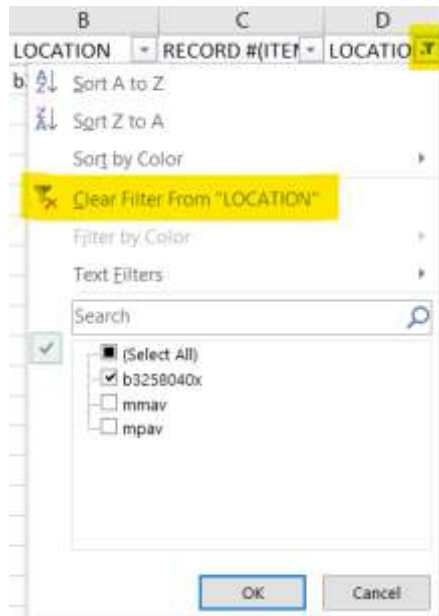
#IUG2021



# Excel: Filter Data

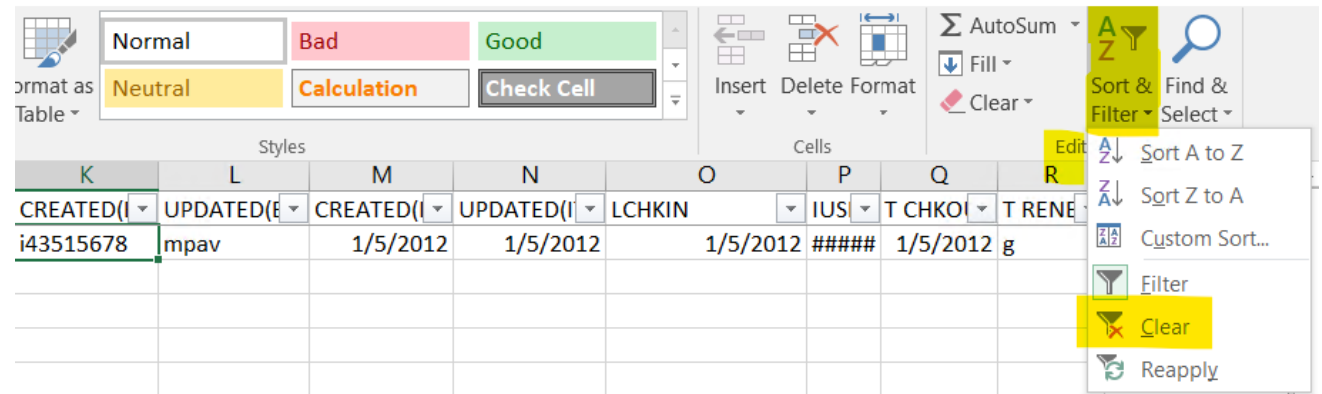
Remove filters by:

1) Click on filter and then use Clear Filter from "LOCATION"



2) Check and uncheck the (Select All) box

3) Choose the "Home" ribbon across the top of Excel  
Choose "Sort & Filter"  
Click "Clear"

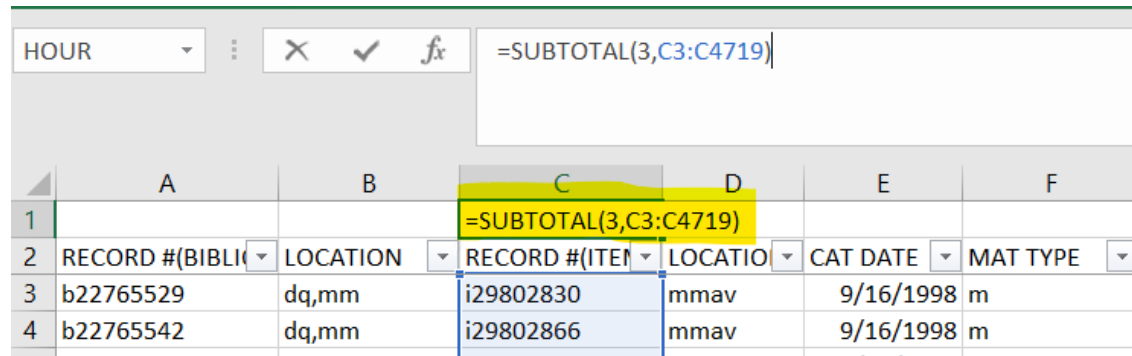




# Excel: Count

To get a count of how many records apply to a given filter:

- 1) Add new row above row 1



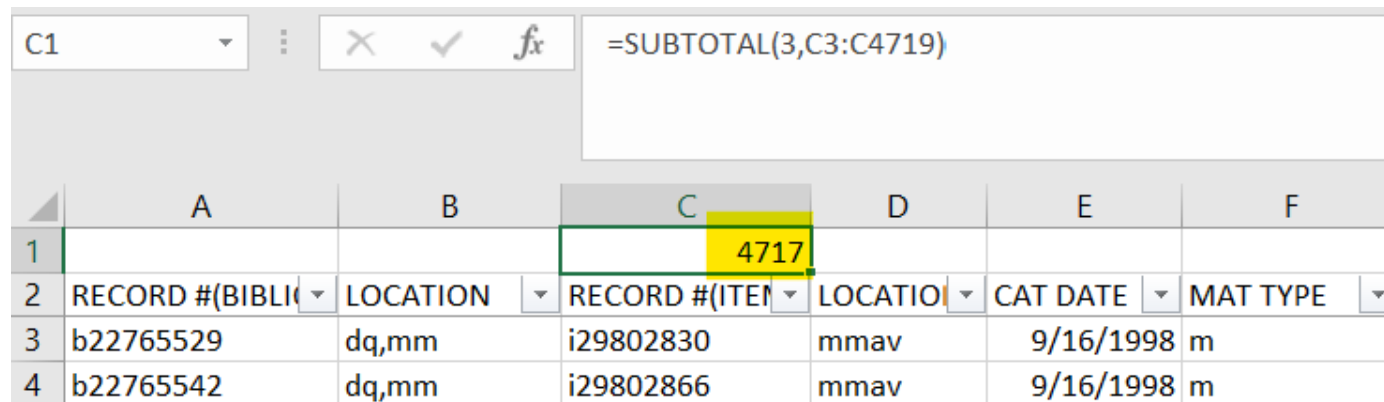
	A	B	C	D	E	F
1			=SUBTOTAL(3,C3:C4719)			
2	RECORD #(BIBLI	LOCATION	RECORD #(ITEM	LOCATIO	CAT DATE	MAT TYPE
3	b22765529	dq,mm	i29802830	mmav	9/16/1998	m
4	b22765542	dq,mm	i29802866	mmav	9/16/1998	m

- 2) Type the formula: =(SUBTOTAL(3,C3:C4719)

3 means COUNTA

C3 means reference 1 and is the first row of data that you want counted

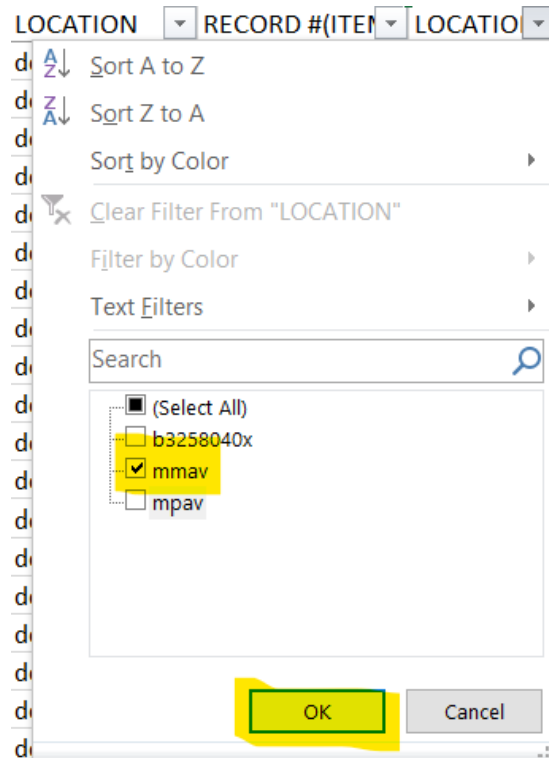
C4719 means reference 2 and is the last row of spreadsheet



	A	B	C	D	E	F
1			4717			
2	RECORD #(BIBLI	LOCATION	RECORD #(ITEM	LOCATIO	CAT DATE	MAT TYPE
3	b22765529	dq,mm	i29802830	mmav	9/16/1998	m
4	b22765542	dq,mm	i29802866	mmav	9/16/1998	m

# Excel: Count

Now filter by location mmav to find out how many DVDs are in the Main Stacks collection



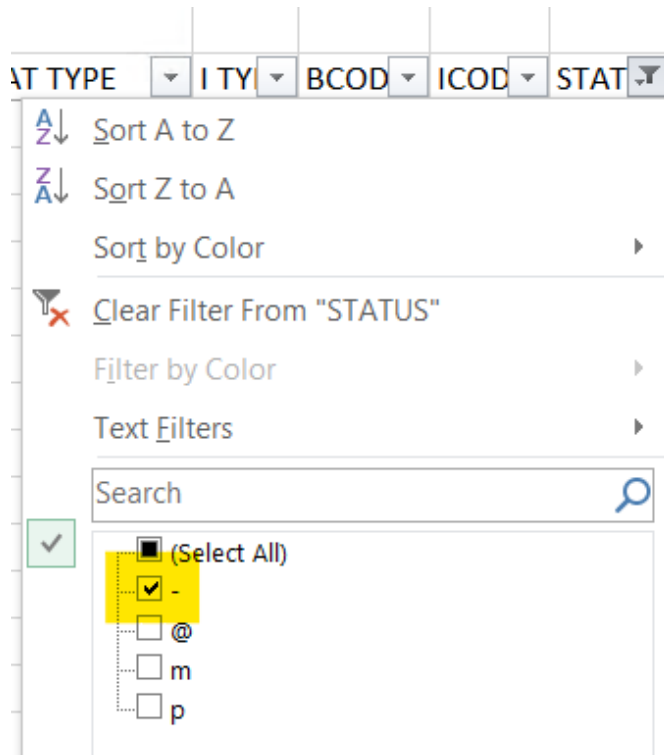
1) Answer is 1,468

	A	B	C	D	
1			1468		
2	RECORD #(BIBLI	LOCATION	RECORD #(ITEM	LOCATIO	C
3	b22765529	dq,mm	i29802830	mmav	
4	b22765542	dq,mm	i29802866	mmav	
5	b23534515	dq,mm	i30905965	mmav	
6	b23925942	dq,mm	i31649671	mmav	

# Excel: Count

Now filter by location mmav to find out how many DVDs are in the main stacks collection

- To find out how many are currently available for checkout:  
In addition to the location filter add a STATUS filter of - "available"



With 2 filters we have 1,434 items available to the public

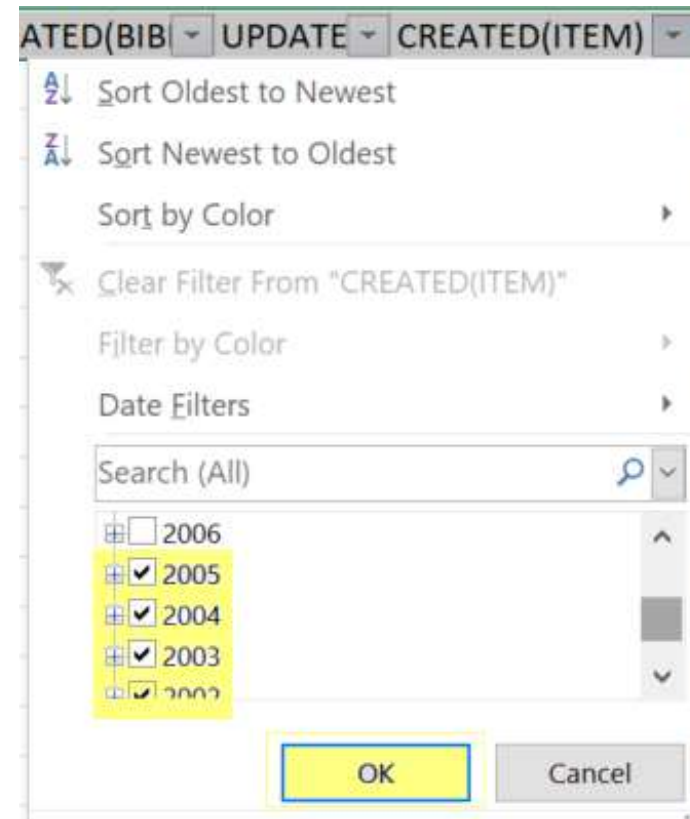
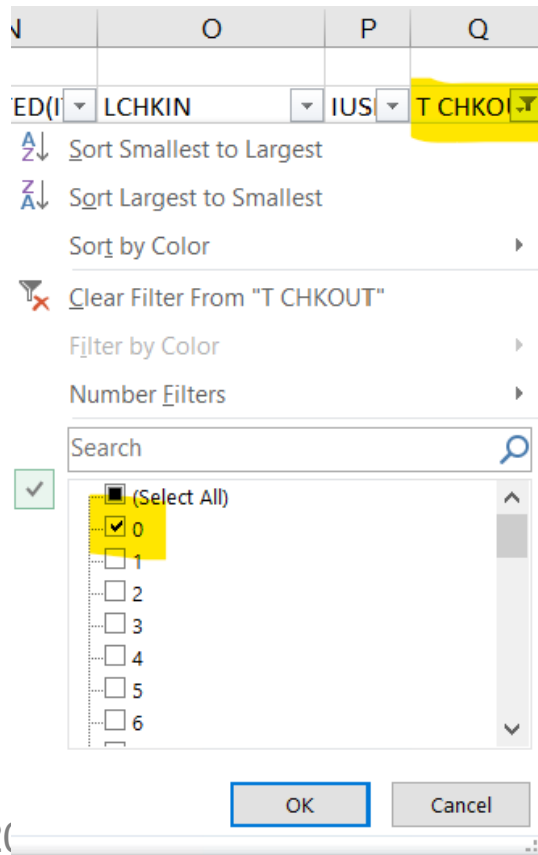
RECORD #	ITEM	LOCATIO	CAT DATE	MAT TYPE	I TY	BCOD	ICOD	STAT	C
		1434							
i29802830		mmav	9/16/1998	m	0	-	-	-	
i29802866		mmav	9/16/1998	m	0	-	-	-	
i30905965		mmav	7/22/1999	m	36	-	-	-	

# Create a Sierra Review File from Excel

Case study: Weed DVDs with 0 checkouts added before 2006

- Excel filter
- Column Q - T CHKOUT
- Select 0

- Excel filter
- Column K - CREATED(ITEM)
- Select years 2005 and before



# Create a Sierra Review File from Excel

- 16 items exist with the filters of CREATED(ITEM) before 2005 and T CHECKOUT = 0

D	E	F	G	H	I	J	K	L	M	N	O	P	Q
									16				
LOCATIC	CAT DA1	MAT TY1	I TYPE	BCODE3	ICODE2	STATUS	CREATED(BIB)	UPDATE	CREATED(ITEM)	UPDATE	LCHKIN	IUSE3	TOT CHK
mmav	6/18/2004	a	36 -	-	-	-	5/25/2004	1/27/2014	6/18/2004	6/12/2017	- -	0	0
mpav	5/16/2005	g	36 -	z	m		3/31/2005	1/27/2014	5/16/2005	1/17/2020	- -	0	0
mpav	6/7/2005	g	36 -	z	c		5/10/2005	1/27/2014	6/7/2005	1/17/2020	- -	0	0
mpav	7/19/2005	g	36 -	z	c		5/10/2005	7/29/2016	7/19/2005	1/17/2020	- -	0	0



# Create a Sierra Review File from Excel

- Highlight the item record numbers from column C

C
24
RECORD #(ITEM
i37267280
i37275872
i37276050
i37276074
i37334013
i37338390
i3915564x
i51010653
i51010665
i51010677
i51010689
i51010707
i51010719
i5301232x

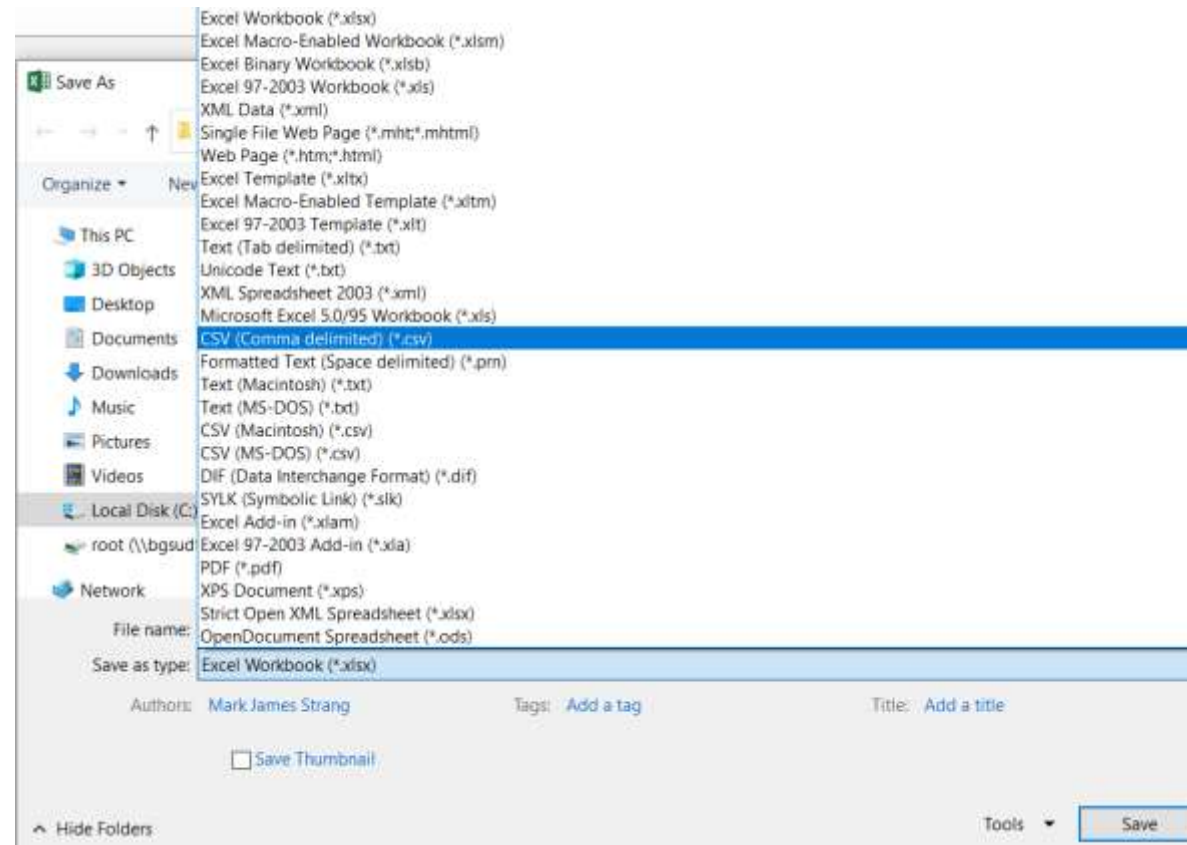


# Create a Sierra Review File from Excel

- Paste the 24 item record numbers into column A in a new spreadsheet

A
i36206179
i37120542
i37164119
i37266858
i37266883
i37266901
i37266937
i37266974
i37267115
i37267267
i37267280
i37275872
i37276050
i37276074
i37334013
i37338390
i3915564x
i51010653
i51010665
i51010677
i51010689
i51010707
i51010719
i5301232x

- In Excel, Save As to choose a name and directory to save the file
- Save as type: CSV (Comma Delimited) (\*.csv)

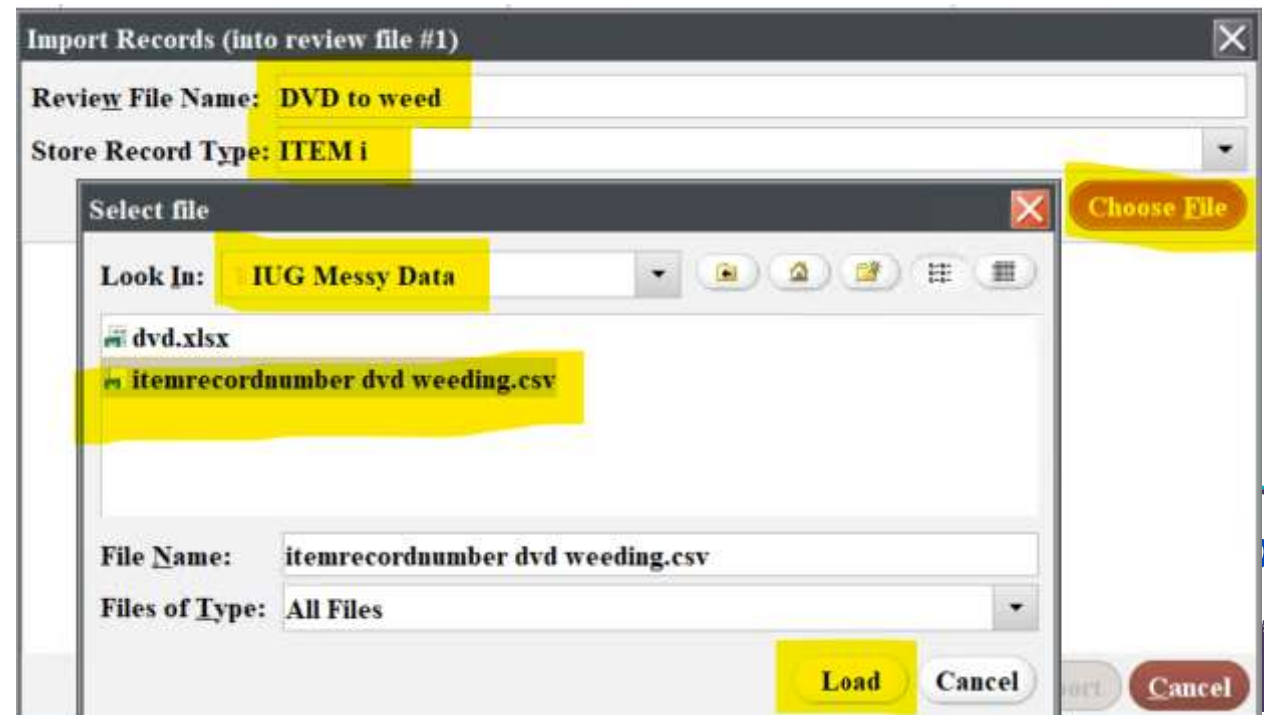


# Create a Sierra Review File from Excel

- Sierra: Create Lists; Highlight Review File; Import Records

Review Files			
File #	Name	Current Records	Max Records
1		0	100

- Name Review File: DVD to weed
- Store Record Type: ITEM i
- Click Choose File
- Select file:
  - Go to where you saved file
  - Highlight the .csv file
  - Click Load



# Create a Sierra Review File from Excel

Import Records (into review file #1):

The item record numbers to be imported are listed  
Click the Import button

Import Records (into review file #1)

Review File Name: DVD to weed

Store Record Type: ITEM i

Choose File

i3620617  
i3712054  
i3716411  
i3726685  
i3726688  
i3726690  
i3726693  
i3726697  
i3726711  
i3726726

Import Cancel

Your new home's Review File of the records from Excel

File	Name	Current Records	Max Records	Type	Status
1	DVD to weed	24	100	i	complete



 #IUG2021 Modify records with Global Update as needed

# Case Study: Shelf Reading List

- Case Study: Curriculum Resource Center wants a shelf list of item holdings
  - Going to have student employee's do an inventory of juvenile materials
  - Item Record List;
  - Type: Item; Field: LOCATION; Condition: equal to; Value A: mjuu Juv Literature
  - AND Type: ITEM; Field: ICODE2: equal to; Value – Display All
  - OR Type: ITEM; Field: ICODE2: equal to; Value z local no central

All

Name	Current Records	Max Records	Type	Status	Login	C
CRC juv literature	50000	50000	i	complete	strangm	03-03-2

Edit existing query

Review File Name: CRC juv literature

Store Record Type: ITEM i

Range  Start i10000008 Stop i78060060

Classic	Classic																												
Enhanced	<table border="1"> <thead> <tr> <th>Term</th> <th>Operator</th> <th>Type</th> <th>Field</th> <th>Condition</th> <th>Value A</th> <th>Value B</th> </tr> </thead> <tbody> <tr> <td>1</td> <td></td> <td>ITEM</td> <td>LOCATION</td> <td>equal to</td> <td>mjuu</td> <td></td> </tr> <tr> <td>2</td> <td>AND</td> <td>ITEM</td> <td>ICODE2</td> <td>equal to</td> <td>-</td> <td></td> </tr> <tr> <td>3</td> <td>OR</td> <td>ITEM</td> <td>ICODE2</td> <td>equal to</td> <td>z</td> <td></td> </tr> </tbody> </table>	Term	Operator	Type	Field	Condition	Value A	Value B	1		ITEM	LOCATION	equal to	mjuu		2	AND	ITEM	ICODE2	equal to	-		3	OR	ITEM	ICODE2	equal to	z	
Term	Operator	Type	Field	Condition	Value A	Value B																							
1		ITEM	LOCATION	equal to	mjuu																								
2	AND	ITEM	ICODE2	equal to	-																								
3	OR	ITEM	ICODE2	equal to	z																								
JSON																													





# Case Study: CRC Shelf Reading List

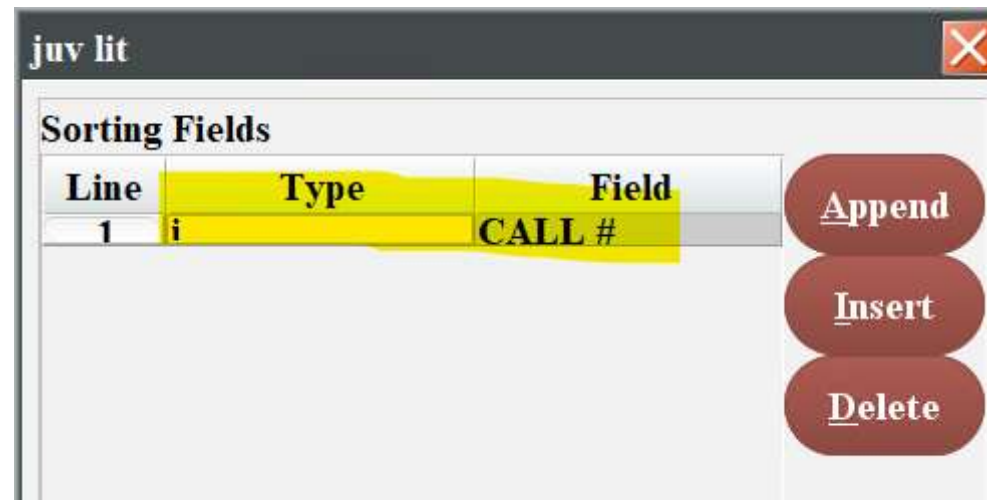
- We have 32,314 items displayed to public as on-the-shelf in CRC juv literature
- Next Sort Records by CALL #
- Excel is not very good at sorting by LC Call #; Dewey Call #; etc.

Review Files

All

File ▾	Name	Current Records	Max Records	Type	Status	Login	Created [date/time]
158	CRC juv literature	32314	50000	i	complete	strangm	03-03-2021 02:07PM

- Sort Records
  - Type: i
  - Field: CALL #
- 
- This will sort by LC Call # or Dewey Call # both of which Excel has issues sorting



# Case Study: CRC Shelf Reading List

- Export Records

All	<b>Search Records</b>	<b>Sort Records</b>	<b>List Records</b>	<b>Import Records</b>	<b>Export Records</b>
File	Name	Current Records	Max Records	Type	Status
158	juv lit	32314	50000	i	complete

“Apply Saved Export” Mark significant fields export 12/23/20  
Pick directory and name of export  
OK and file will export to your desktop.

juv lit

Export ITEM Information

Fields to be exported

Line	Type	Field
1	h	RECORD #
2	BIBLIOGRAPH...	LOCATION
3	ITEM	RECORD #
4	ITEM	LOCATION
5	BIBLIOGRAPH...	CAT DATE
6	BIBLIOGRAPH...	MAT TYPE
7	ITEM	I TYPE
8	BIBLIOGRAPH...	RCORP?

Field delimiter: ~

Text qualifier: "

Repeated field delimiter: ;

Maximum field length (0-1000): <none>

File: sktop\IUG Messy Data\Shelf List Juv Lit.txt

Buttons: OK, Apply Saved Export, Save This Export, Close

# Case Study: CRC Shelf Reading List

Import data into Excel following the previous explanation!

Insert an empty column A

Enter 1, 2, 3 in the rows of the first 3 records

Highlight the 3 records and use the [AutoFill and Flash Fill](#) feature to drag numbering pattern down the entire column of records

This number columns allows you to  
Return to a call number sort in Excel  
After you've sorted or filtered the  
data.

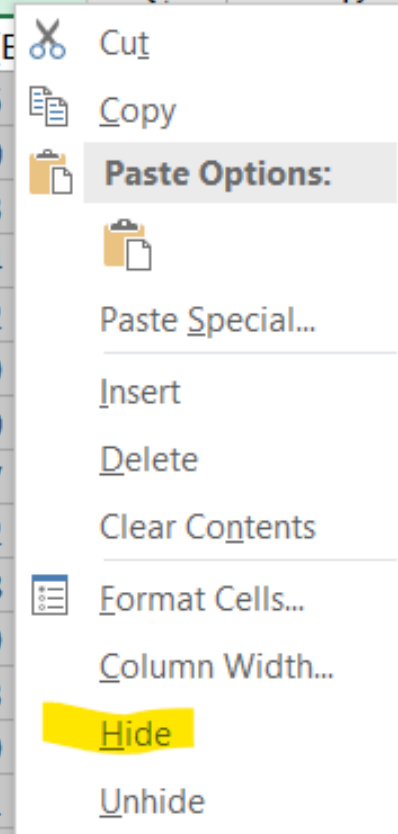
	A	B	C	D
1		RECORD #(BIBLIO)	LOCATION	RECORD #(ITEM)
2	1	b49134395	mj	i62195001
3	2	b34653600	mj	i45904832
4	3	b34509513	mj	i45805192
5		b1738524	mj	i53491087
6		b27911822	mj	i37775431
7		b31689449	mj	i42423806

# Case Study: CRC Shelf Reading List

Select a column you don't want to print in the shelf list

Right click with mouse and hit the Hide option

A	B	C	D
	RECORD #(E		
1	b49134395		
2	b34653600		
3	b34509513		
4	b41738524		
5	b27911822		
6	b31689449		
7	b14895730		
8	b29501787		
9	b39560892		
10	b28885818		
11	b22039259		
12	b22672813		
13	b29793889		
14	b28279451		



# Case Study: CRC Shelf Reading List

- Hide unnecessary columns for printing
- Organize column widths
- Put borders around cells
- Change page orientation to landscape
- Change to narrow margins
- Format cells width to fit on a sheet of paper

D	I	K	P	T	W	AB	AC
RECORD #(I	B	S	LCHKIN	LOUTDATE	CALL #(ITEM)	AUTHOR	TITLE
i62195001	-	-	4/17/2019 10:00	3/21/2019 17:03	JUV 001 N277by 2017		By the numbers 3.14 / National Geogra
i45904832	-	-	- -	- -	JUV 001.4 A154an	Aboff, Marcie	Analyzing doggie data / by Marcie Abof
i45805192	-	-	2/19/2020 11:32	12/30/2019 9:34	JUV 001.4 F684kn	Fontichiaro, Kristin	Super smart information strategies. Kn
i53491087	-	-	9/29/2019 19:03	9/7/2019 18:59	JUV 001.4 M385in 2016	Martineau, Susan, au	Infographics for kids / researched and v

- Dashed column indicates page break
- Print pages you want:

i62195001	-	-	4/17/2019 10:00	3/21/2019 17:03	JUV 001 N277by 2017		By the numbers 3.14 / National Geog
i45904832	-	-	- -	- -	JUV 001.4 A154an	Aboff, Marcie	Analyzing doggie data / by Marcie Ab
i45805192	-	-	2/19/2020 11:32	12/30/2019 9:34	JUV 001.4 F684kn	Fontichiaro, Kristin	Super smart information strategies. h



# Case Study: 092 Past Practices

Staff or students can work off a computer or a printed copy to do inventory

You can also do a limited create list based upon the call # on the endcaps of your shelves!

WARNING! If the collection spans decades, then you might find past practices regarding the |b of your call number hindering your ability to get a good shelf list.

Current practice:

<b>c</b>	<b>092</b>			<b> pJUV a001.4 bA154an</b>
<b>b</b>	<b>A11391535272</b>			

Past practice to print labels resulted in:

<b>c</b>	<b>092</b>			<b> pJUV a001.4 A154an</b>
<b>b</b>	<b>A11391535272</b>			

# Case Study: 092 Past Practices

If you want to go hunting for this type of variance in call numbers:

Use the Export Records criteria of MARC Tag 092p |; 092 |a; 092 |b to get separate columns in Excel to quickly spot errors.

juv lit

**Export ITEM Information**

**Fields to be exported**

Line	Type	Field
1	ITEM	RECORD #
2	ITEM	LOCATION
3	ITEM	CALL #
4	ITEM	MARC Tag 092  p
5	ITEM	MARC Tag 092  a
6	ITEM	MARC Tag 092  b
7	i	BARCODE
8		

# Case Study: 092 Past Practices

When imported into Excel, you'll see no |b

You can use filters to get a limited number of questionable records:

A	B	C	D	E	F	G
			94			
RECORD #(ITEM)	LOCATIC	CALL #(ITEM)	092  p	092  a	092  b	BARCODE
i11122390	mjju	JUV 398.4L26g	JUV	398.4L26g		A11347550839
i11123023	mjju	JUV 398.4L26y	JUV	398.4L26y		A11347550961
i14494553	mjju	JUV 398.2P45g	JUV	398.2P45g		A11301213176
i1501227x	mjju	JUV 398.4G864f	JUV	398.4G864f		A11345697731
i16656064	mjju	JUV 398.6S39u	JUV	398.6S39u		A11359928725
i1705753x	mjju	JUV 398.2S84t	JUV	398.2S84t		A11348227148

You can copy and paste the item record number into Sierra to pull them up one at a time to fix. Or you could use the item record number column and import the data into a review file to fix the problem records.

**c** 092 |pJUV|a027G44c

**b** A11344818957

# Case Study: Deleting Bibliographic Records

As mentioned earlier on staff cannot delete bibliographic records at BGSU. We do this to ensure syncing between our Sierra catalog and our Summon discovery layer.

Staff delete attached records and then change the bcode3 to d delete.

Once a record has been coded bcode3=d for 4 weeks it is time for me to delete it.



#IUG2021



# Case Study: Deleting Bibliographic Records

- BGSU Jerome Library uses Summon as our Discovery Layer
  - Nightly we use Sierra scheduler to send bibliographic record updates to Summon (ProQuest)
  - We need to keep bibliographic records in our system after staff identify them to ensure that the delete record information is sent to discovery layer database
  - We achieve this with bibliographic bcode3 field:



- Staff are not allowed to delete bibliographic records
- Staff delete the item and all attached records, then change the bib bcode3 to d DELETE CODE
- I use Delete Records to bulk delete bibliographic records after their 2-week update embargo



# Case Study: Deleting Bibliographic Records

Review File Criteria:

BIBLIOGRAPHIC BCODE3 equal to d

AND BIBLIOGRAPHIC UPDATED less than 02-14-2021

AND BIBLIOGRAPHIC LINKED REC not exist to ITEM

AND BIBLIOGRAPHIC LINKED REC not exist to ORDER

AND BIBLIOGRAPHIC LINKED REC not exist to CHECKIN

Term	Operator	Type	Field	Condition	Value A
1		BIBLIOGRAPHIC	BCODE3	equal to	d
2	AND	BIBLIOGRAPHIC	UPDATED	less than	02-14-2021
3	AND	BIBLIOGRAPHIC	LINKED REC	not exist to	ITEM
4	AND	BIBLIOGRAPHIC	LINKED REC	not exist to	ORDER
5	AND	BIBLIOGRAPHIC	LINKED REC	not exist to	CHECKIN



# Case Study: Deleting Bibliographic Records

File	Name	Current Records	Max Records	Type	Status	Login
168	bib delte	3734	75000	b	complete	strangm

Sierra Function: Delete Records

Delete the listed BIBLIOGRAPHIC record ONLY (if no other records attached)

Used to ensure nothing gets unintentionally deleted when accidents happen

**sierra** FUNCTION Delete Records

b10161594  
AUTHOR Oakeshott, R. Ewart  
TITLE The archaeology of weapons ; arms and armor from prehistory to the age of chivalry / Illustrated by the author  
IMPRINT New York : Praeger, [1960]

Review Review file: 168. bib delte (3734) (BIBLIOGRAPHIC) Start

Delete the listed BIBLIOGRAPHIC record ONLY (if no other records attached)  
 Delete the listed BIBLIOGRAPHIC record AND all attached records

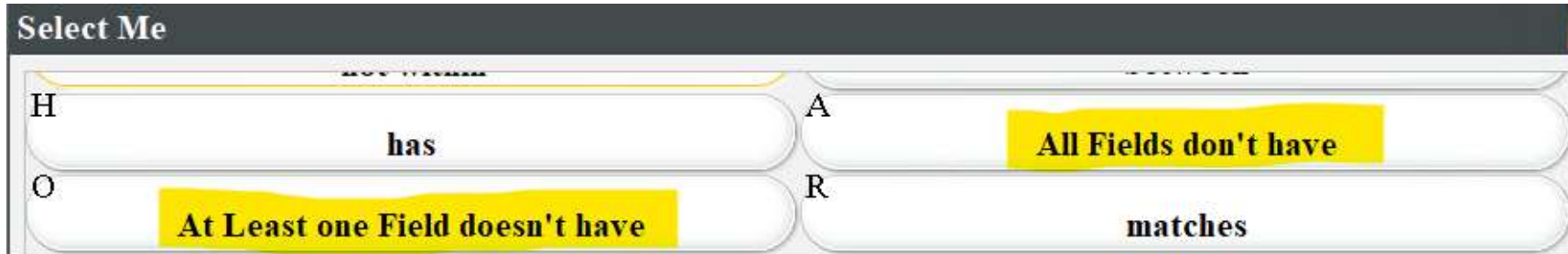
Delete Records

	Record	Description
1	b10161594	The archaeology of weapons ; arms and armor from prehistory to the age of chivalry / Illustrated by the author
2	b1022497x	The art of the sabrè and the épée / by Luigi Barbasetti ... profusely illustrated with line cuts by Ciro Barbasetti



# Case Study: Finding the absence of data

Finding the absence of data in Sierra is very hard!



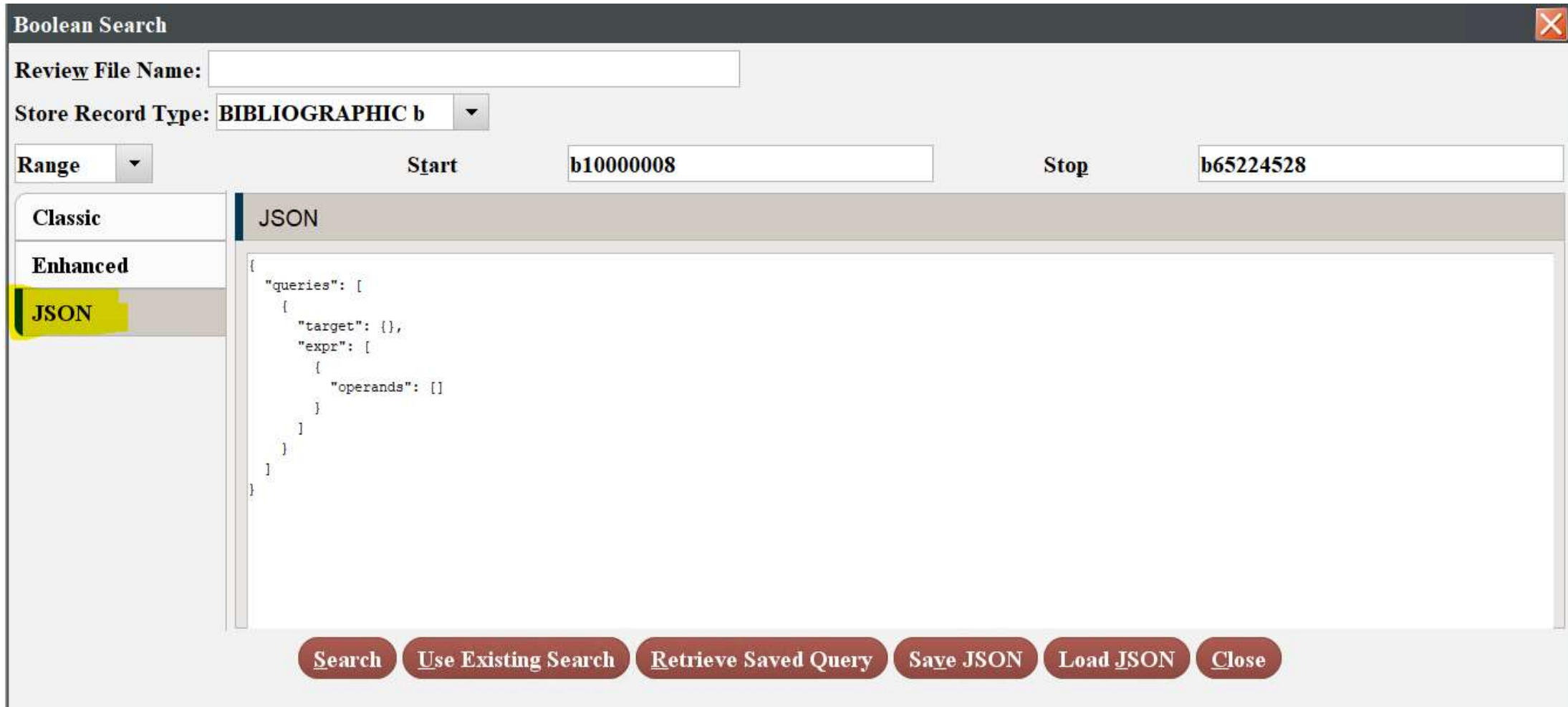
Over the years it seems that “At Least one Field doesn’t have” and “All Fields don’t have” are not consistently reliable in finding the absence of data!

Exporting the data in a field you are looking for nothing in and importing to Excel can help you find it!

Past IUG SQL presentation are a great resource for finding the absence of data or null fields

# Case Study: Finding the absence of data

Past IUG presentations and listproc discussion on JSON is another powerful tool to find data



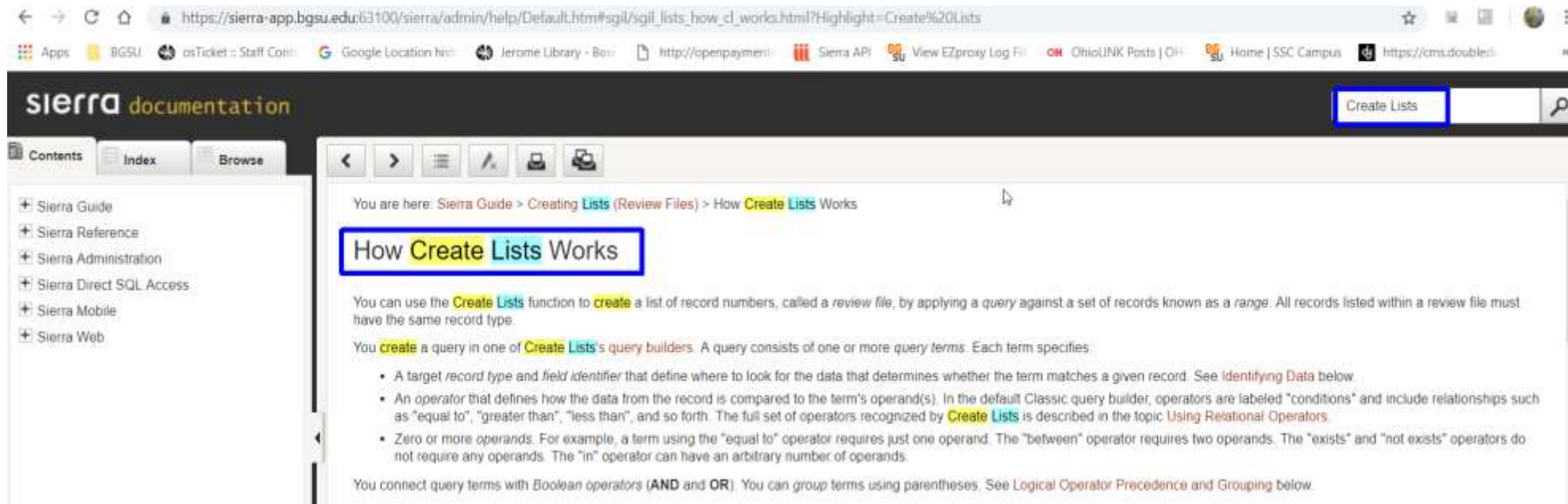
The screenshot shows a web-based interface for a Boolean Search. At the top, there is a title bar "Boolean Search" with a close button. Below it, there are several input fields: "Review File Name:" (empty), "Store Record Type:" (set to "BIBLIOGRAPHIC b"), "Range:" (set to "Start" and "Stop"), "Start:" (set to "b10000008"), and "Stop:" (set to "b65224528"). On the left side, there is a navigation menu with three options: "Classic", "Enhanced", and "JSON" (which is highlighted in yellow). The main area displays a JSON query structure:

```
{
  "queries": [
    {
      "target": {},
      "expr": [
        {
          "operands": []
        }
      ]
    }
  ]
}
```

At the bottom of the interface, there are five buttons: "Search", "Use Existing Search", "Retrieve Saved Query", "Save JSON", "Load JSON", and "Close".

# Training Resources for Create Lists

- Innovative Sierra Training Website
  - [Sierra Manual – web based access password free](#)
    - [Create Lists](#)



The screenshot shows a web browser displaying the Sierra documentation website. The URL in the address bar is [https://sierra-app.bgsu.edu:63100/sierra/admin/help/Default.htm#sgil/sgil\\_lists\\_how\\_cl\\_works.html?Highlight=Create%20Lists](https://sierra-app.bgsu.edu:63100/sierra/admin/help/Default.htm#sgil/sgil_lists_how_cl_works.html?Highlight=Create%20Lists). The page title is "How Create Lists Works". The content includes a navigation menu on the left with items like "Sierra Guide", "Sierra Reference", "Sierra Administration", "Sierra Direct SQL Access", "Sierra Mobile", and "Sierra Web". The main content area contains the following text:

You are here: [Sierra Guide](#) > [Creating Lists \(Review Files\)](#) > [How Create Lists Works](#)

## How Create Lists Works

You can use the **Create Lists** function to **create** a list of record numbers, called a *review file*, by applying a *query* against a set of records known as a *range*. All records listed within a review file must have the same record type.

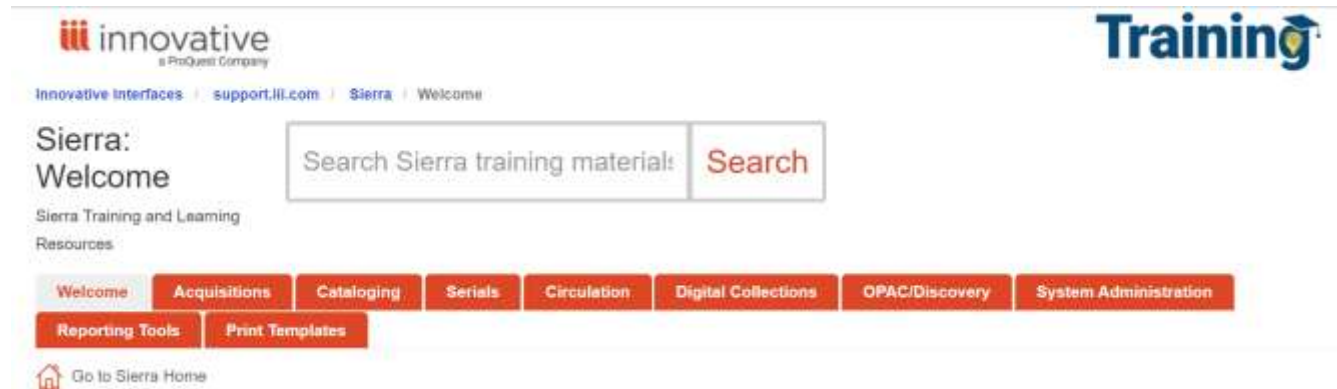
You **create** a query in one of **Create Lists's** *query builders*. A query consists of one or more *query terms*. Each term specifies:

- A target *record type* and *field identifier* that define where to look for the data that determines whether the term matches a given record. See [Identifying Data](#) below.
- An *operator* that defines how the data from the record is compared to the term's operand(s). In the default Classic query builder, operators are labeled "conditions" and include relationships such as "equal to", "greater than", "less than", and so forth. The full set of operators recognized by **Create Lists** is described in the topic [Using Relational Operators](#).
- Zero or more *operands*. For example, a term using the "equal to" operator requires just one operand. The "between" operator requires two operands. The "exists" and "not exists" operators do not require any operands. The "in" operator can have an arbitrary number of operands.

You connect query terms with *Boolean operators* (**AND** and **OR**). You can group terms using parentheses. See [Logical Operator Precedence and Grouping](#) below.

# Training Resources for Create Lists

- Innovative Sierra Training Website
  - [The Sierra Training and Learning Center](#)



- [Create Lists are covered in the Reporting Tools section](#)
  - [Create Lists Anatomy – Searching](#)
  - [Database Cleanup: Using Create Lists to Find Problem Records](#) - Mike McClellan 58:12 minutes
- [Innovative Webinar Recordings](#)
  - [Sierra Global Update: Strategies for Record Maintenance](#) - Nazee Depp
  - [Checking your Sierra system using Create Lists](#) - Mike McClellan 58:13
  - [Webinar: Sierra Database Cleanup](#) - Mike McClellan 60:10
  - [Webinar: Sierra SQL for Record Data Review](#) - Jason Borland 51:24





# Training Resources

- **Institutional Training Documents by other IUG members**

- 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>

Appendix C: Boolean Conditions is an excellent tutorial on how to use them in Create Lists!

This is located on page 50.

# Training Resources

## ■ YouTube Videos

- Introduction to Create Lists - Steve Heser, MCFLS
  - [https://www.youtube.com/watch?v=LbYrt\\_IPUdQ](https://www.youtube.com/watch?v=LbYrt_IPUdQ) 1 hour 10 minutes Oct. 12, 2017
  - Slides: [https://drive.google.com/file/d/0B-U\\_wAllpfPbMmdxZ3dGMzJmSm8/view](https://drive.google.com/file/d/0B-U_wAllpfPbMmdxZ3dGMzJmSm8/view)
- Advanced Create Lists and Sierra Statistics - Steve Heser, MCFLS
  - <https://www.youtube.com/watch?v=GFdAPSlpdh4> 2 hours Nov. 1, 2017
  - 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)
- Web Management Reports - Steve Heser, MCFLS
  - [https://www.youtube.com/watch?v=20zU\\_5K7PB8](https://www.youtube.com/watch?v=20zU_5K7PB8) 2 hours



# THANK YOU

Questions?

# Finding Messy Data Q&A

## ■ Progressive Stacking

- This is a technique intended to give underrepresented voices a chance to speak, particularly in an environment where there is a dominant group. Suppose you choose to self-identify as belonging to an underrepresented group, especially Black, Indigenous, and People of Color (BIPOC), and you'd like to ask a question or make a comment in the chatbox. In that case, you can choose to include an "\*" asterisk at the start of your question/comment. Your question/comment would be prioritized.

- [Article accessed 02/24/2021 Wikipedia](#)



#IUG2021

