

# Create Lists for Collection Maintenance in the Public Library

## EGL-IUG September 24, 2004

### Getting Started

You'll need a log-in with permission to use create lists.

- In Milcirc, select **Create List** from the menu and double-click
- Select an Empty file from the list and click **Search Records**.

### Preliminaries

- Name your file
  - In Review File Name: type the name of your file
- Pick your record type
  - In Store Record Type: select Item (that should be the default)
- Range
  - Sets itself automatically to the Record Type you selected above

**Note:** while you can search using data from a variety of record types, your resulting list can only contain a single record type. For weeding and maintenance, item records are the most useful record to store.

### Setting Search Terms

Construct your search line by line and from left to right by selecting the record Type, the record Field to mine for data, the Condition that data should meet, and the Value that data should have. Double-clicking in Type, Field, Condition, and Value boxes will display all the choices available to you. Values such as dates or call numbers are entered by you. Each search line is linked to the next by a Boolean operator.

### Beware the OR

Remember your Boolean searching techniques. When using OR as an operator in search that also includes AND, group your OR terms together with parenthesis. To group terms, hold down on the shift key as you click on and highlight the lines you want to group together. Then click the Group button. Use the Ungroup button to remove parenthesis from highlighted lines. Check the operators that you are applying within or to grouped terms to make sure that you are using AND or OR as you intend.

### Don't forget to Sort

There are search terms that are difficult to combine together effectively without assembling a very complex search structure. Remember, once you've compiled a list, you can sort and re-sort the results on pretty much any data field that is available in the item or bib records. You can then remove records from the list that don't meet your needs or copy that list into another empty file and rework both lists in different ways.

## Where are your Items? Using Call Numbers

Add your location code(s). Using location codes as a search term is an easy first step in narrowing your focus to a specific set of items. Use the operator OR, not AND, to join multiple codes. When using OR, highlight all linked lines and then click the **Group** button to enclose those terms in parenthesis.

Limit by Fiction Call #. If your fiction call numbers are uniform, e.g. LC classification, or you have a tightly controlled set of prefixes, you could use one of the methods for nonfiction call numbers described below. Otherwise, use record Type BIBLIOGRAPHIC and record Field AUTHOR. To limit to a range, use Condition "between." Value A is the first letter of the first author surname in your range; Value B is the first letter of the last author surname in your range followed by a Z. Your location codes may help with your limiting here as well if you have codes for different genres.

Boolean Search

Review File Name: limit by call number

Store Record Type: ITEM i

Range Start: i10000008 Stop: i1698996x

Term	Operator	Type	Field	Condition	Value A	Value B
1	(	ITEM	LOCATION	has	capmy	
2	OR	ITEM	LOCATION	has	clpmy	)
3	AND	BIBLIOGRAPHIC	AUTHOR	between	a	fz

Limit by Nonfiction Call #. In this instance, you may want to change the range of records you're searching from Item Record numbers to the Call Number Index. Click on the **Range** drop-down menu and select **Index**. Select **Call Number** from the next drop down, and then enter the range you would like to search. Note that here, Ill will automatically left truncate the call numbers for you, so you do not have to extend the number to the right of the decimal unless you want to be very specific in your range.

Boolean Search

Review File Name: CV 610s

Store Record Type: ITEM i

Index CALL NO (c) 610 to 619

Term	Operator	Type	Field	Condition	Value A	Value B
1	(	ITEM	LOCATION	equal to	capnf	
2	OR	ITEM	LOCATION	equal to	clpnf	)
3	AND	BIBLIOGRAPH...	@266	less than	2000	
4	AND	ITEM	STATUS	equal to	-	
5	AND	ITEM	PATRON#	equal to	0	

Or, look for call numbers as a search term. Leave the Range set to Item Record numbers. Use Field CALL#. Condition is "between." Value A is the bottom of the range and Value B is the top. Remember here there is no left truncation; you must extend the number to the right of the decimal when necessary. For Value B, take the number out to .9999999 in order to capture the full range of that final call number.

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

- Review File Name: limit by call number
- Store Record Type: ITEM i
- Range: Range (dropdown)
- Start: i10000008
- Stop: i1698996x

Term	Operator	Type	Field	Condition	Value A	Value B
1	(	i	LOCATION	has	capnf	
2	OR	ITEM	LOCATION	has	clpnf	)
3	AND	BIBLIOGRAPHIC	CALL #	between	500	519.9999999

**\*\*Millennium Silver Enhancement:** If you have upgraded to Silver, you can set your Create Lists so that it will automatically interfile bib and item call numbers, a very useful thing if you need to create a shelf list of some kind. Before you start your search, change your **Settings**. From the tool bar at the top of the Create List screen, click the **Settings** button, then check off the **Look Up Call Numbers** box. Proceed with your list.

## Limiting by Item Date or Publication Date

All items have a Created date indicating when the record was added to the catalog. If the item was created in III, you're in business. If it migrated from a previous system, then its Created date is likely the date of one of the data dumps. Using the publication date from the bib record is one way to get around the lack of an accurate item date. Publication date is also a useful field to combine with call number searches when working on collection development.

Use the item Created date to limit your search to new items, older items, or items added within a date range.

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

- Review File Name: CV Fiction
- Store Record Type: ITEM i
- Range: Range (dropdown)
- Start: i10000008
- Stop: i17243300

Term	Operator	Type	Field	Condition	Value A	Value B
1		ITEM	LOCATION	equal to	capfi	
2	AND	ITEM	LOCATION	equal to	clpfi	
3	AND	BIBLIOGRAPHIC	AUTHOR	between	a	fz
4	AND	ITEM	CREATED	less than or e...	12-21-2003	- -

Use the publication date. Use record Type Bibliographic and then double click on record **Field** to see the choices available. Select the **008 tab** from the top of the grid display and then select **Date One**. Condition is either “less than”, “greater than”, “within”, or “equal to” depending upon what you want to retrieve with your search. Value A is the date you want to use as a benchmark. Remember if you use “within”, you need to use dates in both Value A and Value B to show a range.

The screenshot shows the 'Boolean Search' window with the following details:

- Review File Name: CV 610s
- Store Record Type: ITEM i
- Index: CALL NO (c)
- Range: 610 to 619
- Search Grid:
 

Term	Operator	Type	Field	Condition	Value A	Value B
1	(	ITEM	LOCATION	equal to	capnf	
2	OR	ITEM	LOCATION	equal to	clprf	)
3	AND	ITEM	CREATED	less than	05-30-2003	- -
4	AND	BIBLIOGRAPH...	Date One	less than	2000	

**\*Tip:** Limiting by both Item Created date and Bibliographic Date One is an easy way to exclude recently added copies of older titles.

## Limiting by Circulation

There are a variety of ways to control for circulation. You can limit by total circulation: TOT CHKOUT; total circulation this year: YTDCIRC; or by total circulation last year: LYRCIRC. You can limit by when an item was last checked out: LOUDDATE; or last checked in: LCHKIN. You can also control for how many times an item has been renewed: TOT RENEW; remember that renewals are counted separately from check outs.

The screenshot shows the 'Boolean Search' window with the following details:

- Review File Name: CV Mysteries
- Store Record Type: ITEM i
- Range: Start i10000008 Stop i17247603
- Search Grid:
 

Term	Operator	Type	Field	Condition	Value A	Value B
1	(	ITEM	LOCATION	equal to	capmy	
2	OR	ITEM	LOCATION	equal to	clpmy	)
3	AND	ITEM	CREATED	less than	05-30-2003	- -
4	AND	BIBLIOGRAPH...	Date One	less than	2000	
5	AND	ITEM	LCHKIN	less than or e...	12-31-2003	- -
6	AND	ITEM	TOT CHKOUT	less than	10	

**\*Circulation Tip:** Before combining several circ related terms, think about what you're trying to find out about a group of items and whether all these questions can be answered in one search. You may wish to do the search using a basic set of criteria, then sort the search afterwards thus allowing you to see all the records involved while still then reorganizing them in order to remove more items from your list.

## Limiting to Items Supposedly on the Shelf Now

To determine what items are both available and not checked out, you need to limit using both the item Field STATUS and the item Field PATRON#. Remember that Ill sees items that are checked out as still available, i.e. they aren't missing, library use only, etc; checked out is not a status. An item that is not checked out will have a 0 in the PATRON# field of its record.

Boolean Search

Review File Name: CV Fiction

Store Record Type: ITEM i

Range Start: i10000008 Stop: i17243543

Term	Operator	Type	Field	Condition	Value A	Value B
1	(	ITEM	LOCATION	equal to	capfi	
2	OR	ITEM	LOCATION	equal to	clpfi	)
3	AND	BIBLIOGRAPH...	AUTHOR	between	a	fz
4	AND	ITEM	CREATED	less than or e...	12-31-2003	- -
5	AND	ITEM	TOT CHKOUT	less than	6	
6	AND	ITEM	LCHKIN	less than or e...	09-20-2003	- -
7	AND	ITEM	STATUS	equal to	-	
8	AND	ITEM	PATRON#	equal to	0	

## Looking at Results

When your search is Complete, click the **Show Records** button to see a list of titles retrieved. The titles are displayed in i number order, and that's not much use to you. However, you can sort this result in a wide variety of ways.

**\*\*Millennium Silver Enhancement:** If you have upgraded to Silver, you have the option of removing all the duplicate item records that may have been retrieved by your search, most commonly because of duplicate call number fields. Click the **Dedupe** button and clean up your list.

## Revising Your Search

After you've run your list, you may find that the results were not what you expected. Or you may get no results at all. Try it again. From the list of search files, highlight your search. Click the **Search Records** button. Answer **Yes** to the pop-up.

The screenshot shows the 'Review Files' window with a list of search files. A 'Warning' dialog box is overlaid on the list, asking for confirmation to overwrite the contents of the selected review file.

File	Name	Current Reco...	Max Records	Type	Status	Initials	Created [date/tim...
10	New Local History and Genealogy	124	5000	b	complete	ctd	09-07-2004 / 17:3...
11	New Audiobooks	117	5000	b	complete	ctd	09-07-2004 / 17:3...
12	New Videos and DVDs	48	5000	b	complete	ctd	09-07-2004 / 17:3...
13	slee				complete		
14	jamestown				complete	jdj	09-16-2004 / 16:1...
15	CV Fiction				complete	ctd	09-20-2004 / 18:0...
16	yaple				complete	ycc	08-25-2004 / 16:4...
17	YS 332.4-339.9999				complete	ycc	08-11-2004 / 10:3...
18	Y in transit				complete	ycc	09-01-2004 / 10:5...
19	iiitest				complete		
20	y 620-649.9999 0 circ, not net				complete	ycc	09-01-2004 / 15:1...
21	ys change to cadfi 0917				complete	yen	09-17-2004 / 13:0...

Your search opens again, but your search terms are gone! Don't panic! Click the **Use an Existing Search** button at the bottom of the window.

Select your search from the list of current searches. Note that the search you've highlighted previews for you. Click **Use**. Now you're ready to revise it and try again.

The screenshot shows the 'Existing Boolean Searches' dialog box. It displays a list of search files with a preview of the selected search's Boolean logic. The 'CV 610s' search is highlighted, and the 'Use' button is visible at the bottom.

Term	Operator	Type	Field	Condition	Value A	Value B
1	(	ITEM	LOCATION	equal to	capnf	
2	OR	ITEM	LOCATION	equal to	clpnf	)
3	AND	BIBLIOGRAPHIC	@266	less than	2000	
4	AND	ITEM	STATUS	equal to	-	
5	AND	ITEM	PATRON#	equal to	0	

Preview: (ITEM LOCATION equal to "capnf" OR ITEM LOCATION equal to "clpnf") AND BIBLIOGRAPHIC less than "2000" AND ITEM STATUS equal to "-" AND ITEM PATRON# equal to "0"

File	Name	Current Records	Max Records	Type	Status	Initials	Created [date/tim...
9	New Large Print	154	5000	b	complete	ctd	09-07-2004 / 1...
10	New Local Hist...	124	5000	b	complete	ctd	09-07-2004 / 1...
11	New Audioboo...	117	5000	b	complete	ctd	09-07-2004 / 1...
12	New Videos an...	48	5000	b	complete	ctd	09-07-2004 / 1...
14	jamestown	41	5000	i	complete	jdj	09-16-2004 / 1...
15	CV 610s	164	5000	i	complete	ctd	09-21-2004 / 1...
16	yaple	2414	5000	i	complete	ycc	08-25-2004 / 1...
17	YS 332.4-339.9...	406	5000	i	complete	ycc	08-11-2004 / 1...
18	Y in transit	87	5000	i	complete	ycc	09-01-2004 / 1...
20	y 620-649.999...	803	5000	i	complete	ycc	09-01-2004 / 1...
21	ys change to C...	15	5000	i	complete	yen	09-17-2004 / 1...

## Copying a search

You can also **Use Existing Search** to copy your search into another file if you want to modify the initial search and run it again and yet still keep the first set of results. This time, first highlight an empty file. Click **Search Records**. Click **Use Existing Search** and select your search from the list.

**\*Important Note:** You can Use Existing Search from only files which still have a name. Once you **Empty** the file, there is no existing search to use.

## Sorting Results

When you run your list, it will automatically sort the results in order by item number. That's not much use to you. So click the **Sort Records** button and reorder the list. To build a sort, you will first click the **Append** button. You will then select the record Type, either BIBLIOGRAPHIC or ITEM, and then the Field within that record type, which you wish to use to sort the records. To sort the list using the criteria you just entered, click on the **Sort/Save** button. You may notice that the Status of your list shows as "Sorting"; when the sort is finished, the Status will be "Complete." Click **Show Records** to show the newly sorted list.

Sorting by Call Number. If you have upgraded to Millennium Silver, you now can ask the system to sort by call number, and it will interfile the bib and item record call numbers. You first need to change your settings to "Look Up Call Numbers" as described above. Then set your sort for record Type Item and record Field Call Number and click **Sort/Save**.

The screenshot shows the Millennium Circulation software interface. The main window is titled "Create Lists" and displays a list of files. A dialog box titled "CV 610s" is open, showing the "Sorting Fields" configuration. The dialog box has a table with the following columns: "Line", "Type", and "Field". The "Field" column is set to "CALL #". The "Append", "Insert", and "Delete" buttons are visible on the right side of the dialog box. The "Sort/Save" and "Cancel" buttons are at the bottom of the dialog box. The background window shows a list of files with columns for "File", "Title", and "Date".

Line	Type	Field
1		CALL #

**Additional Useful Sorts.** You can sort on most fields found in the item or bib record. Sometimes it makes sense to sort your list in order to remove a group of items from the list that would have been difficult to pick up during the initial search. E.g., sort by TOT RENEWAL and you'll be able to find out which items have been renewed many times and therefore weren't on the shelf to be checked out; TOT CHKOUT doesn't always tell the whole story.

**Combining Sorts.** You can have your list sorted on multiple terms all at once simply appending multiple lines into the sorting box. The system will sort the first term and then sort those results using the second term and so on. For example, you could sort a fiction list using record Type BIBLIOGRAPHIC and record Field AUTHOR, then append another line with record Type BIBLIOGRAPHIC and record Field TITLE. Your resulting list of items would be sorted by author, and then sorted by title within each author. Or sort by author and total check out to sort your list of items by author and then by circ by item for each author.

## Exporting your Results—It's Not So Hard

In order to use your list for weeding, or to contemplate it quietly later, you need to print it in a useful format. You may also want to save the data in a file for later use. To save the file, you need to export it. You are not limited to only the Fields you used to sort your list. You can pull out as much data from the item or bib record as you like, including things such as Barcode, Total Checkout, Last Out Date, Date One, Author, Title, etc.

If the list is open, close it. Then click **Export Records**. You're creating a set of data that will be organized in rows and columns. **Append** data fields in the order in which you'd like them to appear in columns. Click **Browse** to get a list of places to which you can send the file. Name the file. Click **Save** to return to the Export box and then click **OK**.

The screenshot shows the 'Export Format' dialog box in a library system. The dialog box has a title bar with a close button (X) and a checkmark. It contains a table with the following data:

Line	Type	Field
1	i	BARCODE
2	ITEM	TOT CHKOUT
3	ITEM	LOUDDATE
4	ITEM	CALL #
5	BIBLIOGRAP...	TITLE

Below the table are fields for 'Field delimiter', 'Text qualifier', 'Repeated field delimiter', and 'Maximum field length (0-1000)'. The 'File' field contains the path 'nd Settings\tdillie\Desktop\CV 610s.txt' and a 'Browse' button. At the bottom are 'OK' and 'Cancel' buttons.



## Make that List Useful

The file you just exported is a text document with fields separated by punctuation—not too handy to read and not easy to manipulate. To make it easier to print a good copy and to review and use the data, import that file into a spreadsheet or database program.

## Saving Your Search

Create List provides a set number of files in which you can save a search. These files are separate from the ones you see in the main list and are used for saving the search structure, not the results. It might be handy to have a few basic, frequently used, searches saved, which you could then re-use and modify without having to retype.

Term	Operator	Type	Field	Condition	Value A	Value B
1	(	ITEM	LOCATION	equal to	capmy	
2	OR	ITEM	LOCATION	equal to	clpmy	)
3	AND	ITEM	CREATED	less than	05-30-2003	- -
4	AND	BIBLIOGRAPH...	@266	less than	2000	
5	AND	ITEM	LCHKIN	less than or e.	12-31-2003	- -
6	AND	ITEM	TOT CHKOUT	less than	10	

(ITEM LOCATION equal to "capmy" OR ITEM LOCATION equal to "clpmy") AND ITEM CREATED less than "05-30-2003" AND BIBLIOGRAPHIC less than "2000" AND ITEM LCHKIN less than or equal to "12-31-2003" AND ITEM TOT CHKOUT less than "10"

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

However, the Saved Search file is limited in size, and you have to share with your colleagues. The low-tech solution is simply to print the screen, **Ctrl-Print Scrn**, showing your search structure, and paste it into a word document. Then save or print. Next time you need to run the search, you just re-type.

## Further Create List Help

<http://www.noblenet.org/swapshop/> Contains several excellent presentations on Create List as well as sample searches. Produced by Elizabeth B. Thomsen, Member Services Manager of the North of Boston Library Exchange.

*Millennium User Manual*—While Innovative documentation can be sketchy, the sections on Creating Lists are very helpful.