

Millennium Create Lists

General tips and things to consider:

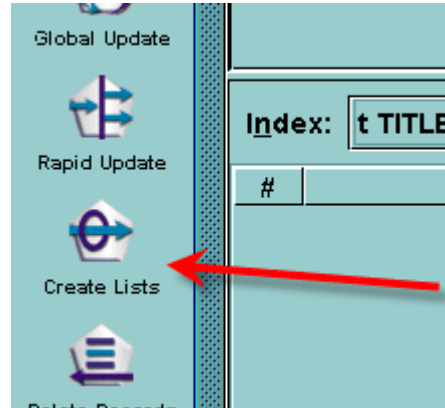
- Create Lists is the name of the mode (items on the left navigation bar in Millennium); after a list is created is also called a Review File.
- Access the Create Lists icon from the left navigation bar in any Millennium module (Circulation, Cataloging, Serials, Acquisitions)
- Create Lists is a way to gather a group of records together to use for a simple report, to modify (either one at a time or as a group), to delete as a group, to use with Millennium Statistics, or to export and manipulate outside of Millennium.
- Creating lists is harmless - you can't hurt the database because you are only generating information *about* records.
- Almost every field in a record can be used to create a list.
- There are different types of lists: bibliographic, item, patron, order, checkin and hybrid. A hybrid list is the most interesting because you can specify items from any or all of the other types. You could, for instance, create a list of records with a shelf location of "bbhau" and a 650 field containing "fantasy." With this sort of list creation, you are limited only by your imagination.
- Take time to look at all the elements in a record, be it item, bib or patron. The better understanding you have of what information is hidden behind a specific piece of the record, the better shot you have at creating the right list.
- Lists can be sorted by any bit of information they contain, even if that data was not used to create the list. Records are interconnected, meaning a patron list is connected to any bib or items currently checked out to a patron, an item list is connected to bibs, etc., so you can sort on any aspect of the connected records.
- Once you have the right list, you can select specific elements and export or print only these bits of information. For example, if you create an item list of overdue books, you can then select the following data fields to export or print: title and author from the bib record; date due, barcode, and call# from the item record; and patron name, patron phone# and patron email address from the patron record.
- You can request that a list be made a Featured List by emailing Maine InfoNet staff at info.support@mssl.net. Include the list name and number in the email. You will receive a URL for that list that you can link to from your library's web page. This can be useful for new books lists, special reading lists, etc.
- Most library staff don't have access to Rapid Update or Delete Records, and no library staff have access to Global Update. Contact Maine InfoNet staff if you need global updates or global record deletion by sending an email with the list number, list name and required changes.
- Information on Create Lists begins on page #100665 in the Help Manual.
- Create a macro for your patron and item barcode ranges to save having to type 9 zeroes and 9 nines every time you create an item or patron list!

Guidelines for use of lists/review files and basic list etiquette:

- Use the smallest slot that will suffice for your list. Don't consume a 60,000 record slot for a list of 1700 records. If you don't know how large a list will be, create it using a large slot, copy it to a smaller slot, then empty the original file.
- Always include the following elements in the name of the review file: library 3-letter abbreviation (always as the first element), a brief descriptive phrase to identify your review file, and the date of list creation. Example: APL Paid 09/04/07.
 - As an option, you may also want to include the initials of the person creating the list in the name. This is good for libraries where several people may work on the same computer but only one person, obviously, is signed in at one time. Then the list name would be: APL Paid 09/04/07 dh
- Delete review files you have created as soon as they are no longer needed. *Never* delete review files created by another library. If lists are deleted on a regular basis, there will be less need to ask for list cleanup and less chance of having a list you are using deleted by Maine InfoNet staff.
- Maine InfoNet staff may delete without notice any files older than 35 days, files lacking a library 3-letter abbreviation and files lacking a date. If you will need a review file longer than 35 days, use the Rename function to insert a more recent date.
- Do not "take ownership" of file slots or files. All slots are available on a first-come, first-served basis to any Minerva site or SOLAR site (depending on the library and system being used).
 - There are two exceptions to this rule:
 - 1) Libraries may take ownership of one list large enough to hold their item records (as long as they are actively using the slot)
 - 2) Libraries *must* take ownership of their Featured Lists to prevent accidental moving or deleting of the list.
- If you need a particularly large slot and it is in use by someone else, feel free to ask the library involved whether and when the slot can be freed up.
- Maine InfoNet staff may move review files to smaller slots from time to time, and without notice. The review file name will be preserved with a move date appended. If you name your lists consistently, starting with the library's 3-letter code, you will always be able to find your list. Do not depend on the list number to remain the same, and always send both the list name and number to the support email when asking for help or for records to be modified or deleted globally.

The Create Lists mode:

From within any Millennium module, click on the Create Lists icon in the left navigation bar:



The Create Lists mode opens with the review files listed in numerical order. These are lists that have been created and not yet deleted. The Review Files tab also lists:

File Edit View Go Tools Admin Reports Window Help

Append Dedupe Copy Empty Rename Den Release Resume Stop Suspend Settings

Create Lists Functions

Review Files Saved Searches

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

File	Name	Current Records	Max Records	Type	Status	Initials	Created [date/time]
1	CML RF 9/1/07 CHIP Items	3666	5000	i	complete	rfrancis	09-17-2007 / 15:02:44
2	CML RF 10/2/07 Septemb...	957	5000	i	complete	rfrancis	10-02-2007 / 10:33:39
3	CML RF 9/5/07 \$ Items	34	5000	i	complete	rfrancis	09-05-2007 / 12:17:59
4	ASD Poorly built locations 8/13/07 JAL	2380	5000	i	complete	econway	08-15-2007 / 21:56:11
5	\$50 2nd indicator=i JC 8/1/07	5000	5000	b	complete		
6	suspect lithgow	50	5000	b	complete		
7	\$50 1 voyages and travelsi fiction	280	5000	b	complete		
8	MCA video deadbeats	2076	5000	i	complete	mcalend	08-16-2007 / 14:19:17
9	tce cataloged fy07	1269	5000	i	complete	kreilly	09-19-2007 / 10:52:50
10	GPL Maine 9/18/07	381	5000	i	complete	mmorey	09-18-2007 / 13:12:41
11	EC lithgow short recs 10/2/07	81	5000	b	complete	econway	10-02-2007 / 17:58:40
12	wit patrons all of them 08290	1540	5000	p	complete	aromans	08-29-2007 / 16:53:32
13	Empty	0	5000		empty		
14	JF ASD bad locations 081707	1693	5000	b	complete	jforest	08-17-2007 / 10:00:02

- The name of the list.
- Current Records -- the number of records currently in that list
- Max Records - the size of that list slot
- Type - i=item, b=bibliographic, p=patron, etc.
- Status - most will say Complete or Empty; will say In Progress if the list is still being run
- Initials - the initials of the person who is logged into the module, not necessarily the person who created the list. The initials will be in red italics if the person has taken ownership of the list.
- Created date and time
 - Note: The Initials and Created columns will be blank if the list was created in the character-based side.

Other information on the Review Files tab includes the commands used to create lists or to work with the data after it has been gathered.

To create a list:

Find an empty slot by clicking on the Name bar to sort alphabetically:

Create Lists Functions

Millennium

Review Files | Saved Searches

All | Search Records | Sort Records | List Records

File	Name ▲	Current Records	Max
149	4/27/06SPPL VT check-outs	31	5000
7	650 1 voyages and travels/vfiction	280	5000
5	650 2nd indicator=1 JC 8/14/07	5000	5000
122	AND POR items created 2007 08 (Aug)	174	5000
150	APL August Overdue Report 09/04/2007	125	5000
144	APL Cass Audiobooks with no Circulation 08/0...7	7	5000
276	APL Items 10/01/2007	77015	80000

Scroll down to the E's to find the slots that are Empty. Select a slot large enough for the list you are creating and click on the slot to highlight it.

File	Name ▲	Current Records	Max Records	Type	Status	Initi
43	Empty	0	10000		empty	
230	Empty	0	60000		empty	
155	Empty	0	5000		empty	
32	Empty	0	5000		empty	
141	Empty	0	5000		empty	
29	Empty	0	5000		empty	
144	Empty	0	5000		empty	
77	Empty	0	60000		empty	
10	Empty	0	5000		empty	
282	Empty	0	3000		empty	

Click on Search Records to begin creating the list.

Search Records | Sort Records

Name ▲ | Current

The steps to create a list are:

1. Name the list (LIB, description, date)
2. Select what type of list to create from the drop-down box (item, patron, and bibliographic are the most common)
3. Select whether you want to search by **Range** (system-generated record numbers), **Review** (to search only the records in a previously created list), **Index** (to search any indexed field; barcode is very useful when looking at your items or patrons), or **Advanced** (a way to use advanced syntax - not covered in this document).

Boolean Search

1 Review File Name:

2 Store Record Type:

3 Range 4

Te...	Operator	Type	Field	Condition	Value A	Value B
1	5					

6

Search Use Existing Search Retrieve Saved Query Save Save As

Group Ungroup Insert Line Append Line Delete Clear All

4. When one of the options in #3 is selected, this section will change to match the selection. **Range** defaults to the range of records in the type of record; **Review** defaults to a drop-down list of already created lists; **Index** changes to drop-down list of indexed fields and two boxes to enter From and To.
5. Specify the information you are looking for by using Boolean search terms. If no conditions are selected, the entire range of records in the #3 will be retrieved. Start in the first line. Double-click in the Type field to see the choices, which are based upon the type of record selected in #2. This is based upon what types of records are connected to it. Double-click to select the Field (depends on the Type selected) and Condition (Equals, Doesn't Equal, etc.). Enter the information you are looking for in Value A (and possible Value B if Between or Not Within was selected for the Condition. Append Line to add more conditions or Insert Line to add a condition above the highlighted line.
6. After you have created the list of criteria to retrieve the records you are searching for, click Search. The list will move to its alphabetized spot if you sorted the list alphabetically to find an empty slot.

Working with a List:

Once you have created a List (now a Review File) you can start to work with it.

The options within Create Lists are:



1. Sort Records: To sort the list, choose sort fields by double-clicking in the Type then Field boxes to select from the options for that record type. You can change the sort order by Appending, Inserting, or Deleting lines. Click Sort/Save when you have the sort order you want.
2. List Records creates a file to be printed. Select the fields you want to list in the same way as the sort order is selected. You can sort a list one way and then choose to List different fields. Other options in List Records are:

A screenshot of a dialog box titled 'List Records'. It contains several input fields and checkboxes. The fields are: Page heading (empty), Starting record (1-62) with value 1, Ending record (1-62) with value 62, and Number of blank lines between records with value 0. The checkboxes are: Number the records in the list (unchecked), Display meanings of fixed-length fields instead of codes (unchecked), Display each variable-length field on a new line (checked), Display labels for variable-length fields (unchecked), and If listing bibliographic title, print it in uppercase (checked). There are OK and Cancel buttons at the bottom.

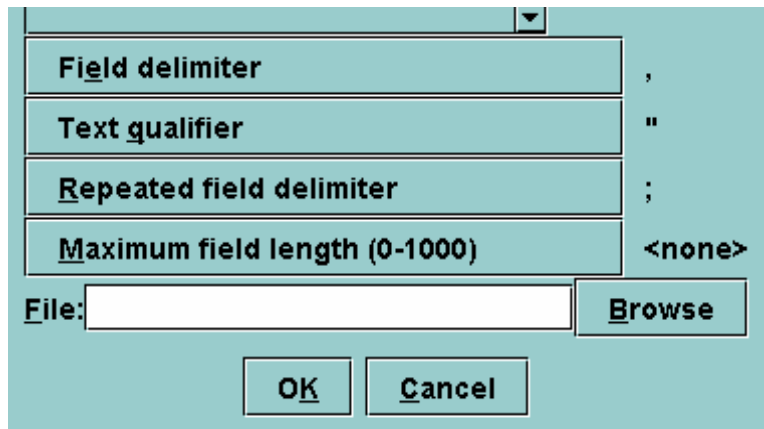
Page Heading: will print a title at the top of the page.

Starting record and Ending Record: to print only a part of the list

Number of blank lines: to separate the records with a blank line.

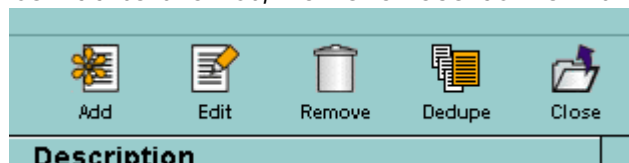
The last four are options on how the list will look and what will print. List Records can be useful for in-house reports, but the format is not pretty and cannot be changed except for the options above. To print a list that will be seen by the public, e.g., a new acquisitions list, it is better to export the list to another application and adjust the font, text size, word wrap, etc.

3. Export Records: As in Sort and List Records, the first thing is to select which fields to export. You don't need to sort records first if you are exporting to a spreadsheet as you'll be able to sort in that application, but you may want to sort before exporting to Word or another word processing program. Export options are:



There is no need to change any of the four defaults. The file will be exported as a text (.txt) file and can be opened in Word or Excel. Click Browse to select where to save the exported file and give it a File Name. Click OK and the file will be exported with the specified name and location.

4. Show Records will open the list of records. Records can be individually edited: double-click on the record name or highlight it and click Edit. To move between records that are open, use CTRL/] (Control/right square bracket) to move forward and CTRL/[(Control/left square bracket) to move back. You can also Add to the list, Remove records from the list, or Dedupe the list:



Add and Remove only add to or remove from the list; you cannot delete a record by Removing it. Dedupe will delete duplicate records from a list. Duplicates can occur if you run a list on bib records but include some item record criteria; the result list may include duplicate bib records due to the item records. If you are really just interested in the bib records, dedupe the before using it.

5. Show Info shows the criteria used to create the list.

dh date test 101807

Store Record Type: ITEM i

Index BARCODE (b) 2485600000000 to 2485699999999

Te...	Operator	Type	Field	Condition	Value A	Value B
1		ITEM	LOCATION	equal to	rocfi	
2	AND	BIBLIOGR...	Date One	between	2000	2002
3	OR	BIBLIOGR...	Date Two	between	2000	2002

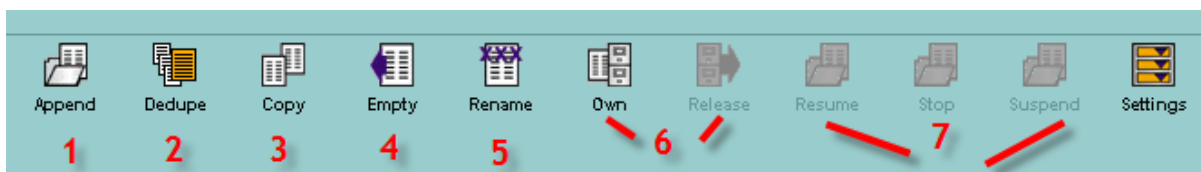
ITEM LOCATION equal to "rocfi" AND (BIBLIOGRAPHIC Date One between "2000"and "2002" O
R BIBLIOGRAPHIC Date Two between "2000"and "2002")

OK

This can be a useful tool if at first you don't get the results you were expecting; click on Show Info and verify that you entered the correct information. It can also be useful if you see a list from another library that looks interesting to you: Show Info will allow you to see how they created the list.

More Fun Things To Do in Create Lists!

There's another row of icons across the top of the Create Lists page:



1. Append allows you to append one list to another list.
2. Dedupe will eliminate duplicated in a list
3. Copy will copy a list to a different slot; select an empty slot then click Copy. Always to back and Empty the original list.
4. Empty: what to do when you are finished with a list, either because it's been printed, exported, or edited.
5. Rename allows you to change the name of an existing list. Use this to change the date of a list if you want to continue using it but it's been more than a month since it was created.

6. Own and Release are available or grayed out depending on the status of the selected list. Highlight and click Own to take ownership (initials will be changed to red italics); click Release to end ownership of a list. Remember the criteria for taking ownership of a list: One/library that is large enough to include the collection and Featured Lists only.
7. Resume, Stop and Suspend are used when a list is being created and has a status of In Progress. You can choose to Stop or Suspend the list creation; if Suspended, you can then choose when to Resume creation of the list.
8. Settings are the same as the options found under Admin/Settings.

How to Save or Rerun a List:



1. After a list has been created, you can change some of the criteria (e.g., a date range) and re-run the list. Highlight the list, click Search Records, and say Yes when asked if you want to overwrite the list. When the search box opens, click on Use Existing Search at the bottom of the Search screen and select the list you want to re-run. If the list is something that you run on a regular basis, at least monthly, remember to change the search criteria as needed *and* change the date in the Review File Name field.
2. The second option is to create a list and click Save (or Save As to save under a different name). This will add the list to the Saved Searches page (the tab next to Review Files on the Create Lists main page, and you will be able to retrieve it for future use. To re-run that list, select an empty slot and click Search Records. But instead of creating a new list, select Retrieve Saved Query at the bottom of the Search screen. Select the list from the list of Saved Searches. As with any list, delete saved searches when no longer needed.

Either of these methods can be useful for searches that are complicated; either re-use the existing list if it's run on a regular basis or save it if it's something you will need less often, as for an annual report, or if it's something you may want to run again but don't want to have to recreate a long list of criteria and conditions.

Featured Lists

A featured list is useful for new items or special reading lists. It shouldn't be too long or it will lose it's usefulness for the patron as it appears to the patron like a section of the OPAC. Name the list something that will make sense to your patrons, and email the name of the list to info.support@msln.net. You will be sent a URL to link to from your library's web page.