Go to **Create Lists** from the Function dropdown menu. 

Pick an empty review file, or change **All** to **Empty**. Click the arrow next to **Max Records** to display the available review files in order by size. Pick a review files that will work for the search. Highlight the review file by clicking on it. Click **Search Records**.



**Note:** Choosing a **review file** that is **not empty** will prompt the system warning that you are overwriting the existing file. Choose **Yes to overwrite your own file,** or choose **No**to return to the list of review files.

This will bring up the **Boolean Search** box. Label the **Review File Name** to **include the two or three identifying letters of your library**. The rest of the file name should match the search term.



**Note:** The maximum length for any review file name is 150 characters.

The **Store Record Type will default to BIBLIOGRAPHIC b**. Click on the dropdown menu next to BIBLIOGRAPIC b to change the type of review file. The choices are **ORDER o**, **CHECKIN c**, **CHECKIN AND CARD cc**, **AUTHORITY a**, **ITEM i**, **PATRON p**, **COURSE r**, **INVOICE n**. Pick the type of review file for your search. The information that follows will only relate to that Store Record Type.



**In this example, we are going to use PATRON p.** The review file will be patrons with billed books.

Double click in the box under **Type**. This will bring up the **Select Me** box. Either click on **PATRON** or type **p**. Click **OK**.

  

Double click in the box under **Field**. This will bring up the **Select Me** box again. Click **47 P TYPE**. Click **OK**.

  

Double click in the box under **Condition**.



This will bring up the **Select Me** box again. Depending on what Ptype(s) are included in the review file, will depend on which search term to use such as **= equal to**, or **w between**.



**Equal To**

The equal to search allows for only one **Ptype** in the search. Enter the **Ptype** number in **Value A**.



**Between**

The **between** search allows for multiple Ptypes. Enter the Ptypes in **Value A** & **Value B**. The ptypes will be Value A – Value B. Example, if Value A was 25 & Value B was 29 this will also include 26, 27 & 28.



**Note:** You can also narrow your search by using your Patron Agency code.

Click **Append Line** to add a new line at the bottom. **Insert Line** will put a line at the top.



**Note:** Once you have the first line, the **Insert Line** will automatically go above the 1st line. If there is more than two lines, than **Insert Line** will go where the cursor is located.

In this example, we are looking for patrons with one Ptype and an **item** with the status of **n** which is Billed. **Note:** repeat the steps for Type, Field, Condition and Value to add the search terms for ITEM, STATUS, equal to, and n.



The search terms will appear in the middle of the Boolean Search box.



Once you are finished entering your search terms, click **Search**.



To find the review file, you might need to **change Empty to Complete** in the dropdown menu. Finding the review file can be done by **File, Name, Login or Created [date/time].** Highlight the review file to view it.





Once the review file has been highligted, viewing the review file records can be done several ways.

1) Click on **Show Records**. Or 2) Double click on the review file.





The **Show Info** button shows the search terms used for the review file.

A review file can be sent by email or exported by using Excel. The **List Records** will let you email the file to yourself or someone else. The **Export Records** will allow you to export the file to Excel. You can also sort your review file using **Sort Records**.



**Sort Records, List Records and Export Records**

The **Sort Records** button will allow the viewing of the review filer records by different fields of information. For example, a sort can be done alphabetically by patron names. Click **Sort Records**.



This will bring up the **Sorting Fields** box. Click on **Type** and **Field** to see the options for sorting the review file.

Double click in the box under Type to get the Select Me pop-up box. 



Picking the Type and Field will display any items related to that type or field.



Double click in the box under Field to get the Select Me pop-up box.



Add more sorting fields by clicking on Append or Insert. **Append** will put the line at the bottom. **Insert** will put a line at the top. **Tip:** Insert will also allow a line anywhere in the sorting fields once there are 3 or more lines. Click **Sort**.

 

The **List Records** button will email the review file to any email address. Click **List Records**.



Once List Records is clicked, the pop-up box to List PATRON information will appear. Put in the fields to be listed and the Page heading for the email (see example on the next page).

**How to send a List of records (review file) to an email account:**



2) Put a subject line for the email under Page heading.

Change 0 to 1 or more to provide space between entries in the list.

3) Checking these entries will change the information to be included in the listing sent to an email account.

4) Click **OK** when finished.

1) Input the fields to be listed in the email. **Tip:** to retrieve the title of the item use Bibliographic as the record type.

This will bring up the Select Standard Printer pop-up box. Click on **E-mail Printer**. Click **OK**.



**Next**, type in the email address of the person who will be receiving the file. Click **OK**.



**Tip:** if the option for E-mail Printer does not appear, it might need to be set up. Click on **File**, **Select Printer** and **Standard Printer**. This will bring up the **Select Standard Printer** and **Question** pop-up box. Enter the email address and click **OK**.



The **Export Records** button will allow exporting of a review file to Excel. **See** [**Creats Lists – Exporting a Review File to Excel**](http://dev.marmot.org/content/create-lists-exporting-review-file-excel)**.**

