Custom Searching in the OCLC ILLiad Client

ATLAS SYSTEMS, INC.

Introductions

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ILLiad Database

- **ILLiad Database**
  - Tables and relationships
  - Helpful documentation
    - http://216.54.31.120/Documentation/ILLiadDatabaseDiagram.pdf
    - http://216.54.31.120/Documentation/ILLiadSSSDiagram.pdf
    - http://216.54.31.120/Documentation/OCLCILLiadReferenceGuide.pdf

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Basic ILLiad Searching

- **Basic ILLiad Searching**
  - Search Requests
  - Custom Search
  - Data Display Grid

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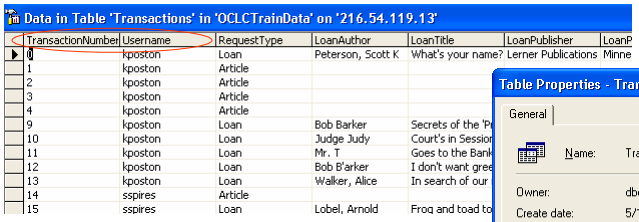
Basic ILLiad Searching

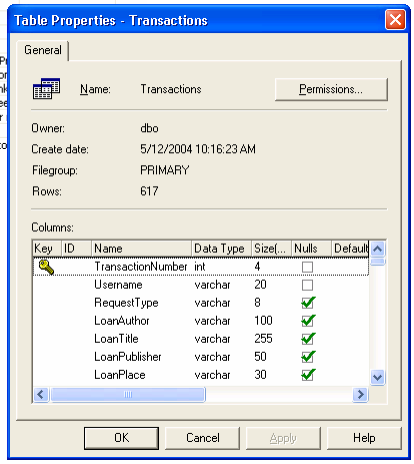
- **Basic ILLiad Searching**
  - Search Requests
    - Edit Edit Request
      - Default Search
  - Search Customers
    - Edit Edit Customer

Basic ILLiad Searching

- **Basic ILLiad Searching**
  - Custom Search
    - Access to 4 different tables
      - 3 in each module

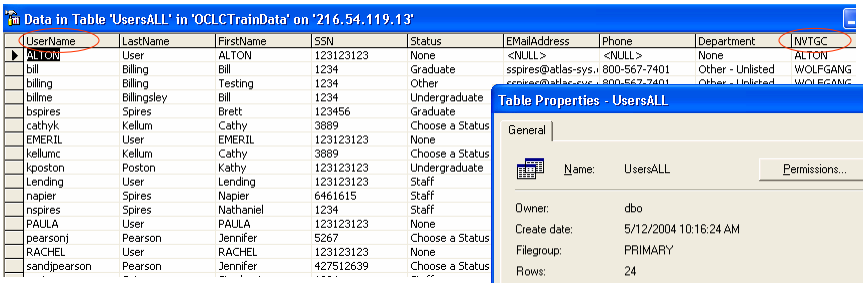
ILLiad Database : Transactions

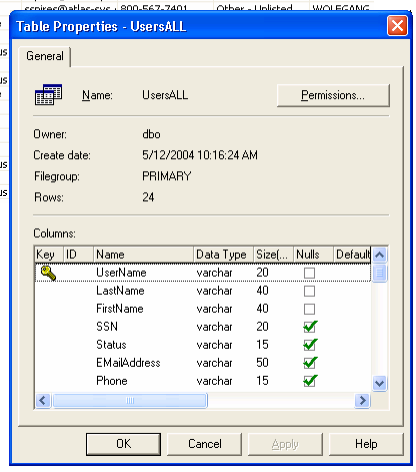




*Transaction Number, ILLNumber, Username,LendingString, LendingLibrary, **ProcessType**, RequestType, TransactionStatus, TransactionDate important here*

ILLiad Database : Users





Note: UsersALL for SSS

Username, NVTGC important here

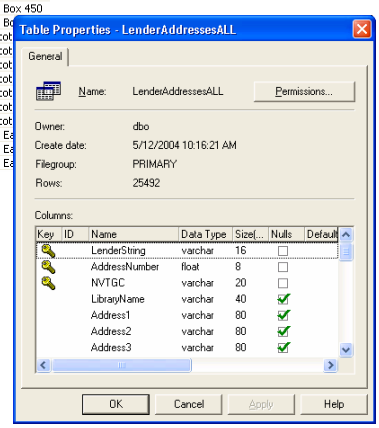
ILLiad Database : LenderAddresses

Data in Table 'LenderAddressesALL' in 'OCLCTrainData' on '216.54.119.13'

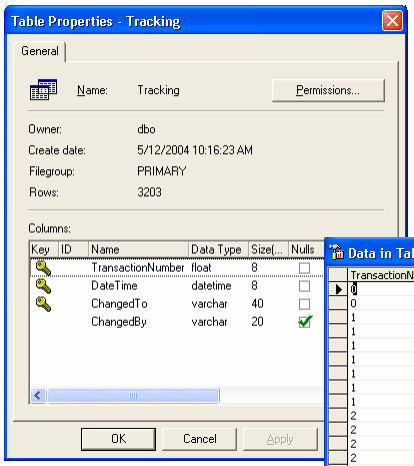
LenderString	AddressNumber	NVTGC	LibraryName	Address1	Address2
A2Q	1	ALTON	Library, ILL	Appalachian School	Rt. 5 Box 450
A2Q	1	EMERIL	Library, ILL	Appalachian School	Rt. 5 Box 450
A2Q	1	ILL	Library, ILL	Appalachian School	Rt. 5 Box 450
A2Q	1	PAULA	Library, ILL	Appalachian School	Rt. 5 Box 450
A2Q	1	RACHEL	Library, ILL	Appalachian School	Rt. 5 Box 450
A2Q	1	WOLFGANG	Library, ILL	Appalachian School	Rt. 5 Box 450
A2Q	1	YAN	Library, ILL	Appalachian School	Rt. 5 Bo
a3e	1	ALTON	University Library,	Prescott College	Prescot
a3e	1	EMERIL	University Library,	Prescott College	Prescot
a3e	1	ILL	University Library,	Prescott College	Prescot
a3e	1	PAULA	University Library,	Prescott College	Prescot
a3e	1	RACHEL	University Library,	Prescott College	Prescot
a3e	1	WOLFGANG	University Library,	Prescott College	Prescot
a3e	1	YAN	University Library,	Prescott College	Prescot
A3U	1	ALTON	Library, ILL	Arizona State Univ	7001 Ea
A3U	1	EMERIL	Library, ILL	Arizona State Univ	7001 Ea
A3U	1	ILL	Library, ILL	Arizona State Univ	7001 Ea

Note: May be LenderAddressesALL for SSS

LenderString,AddressNumber, NVTGC important here

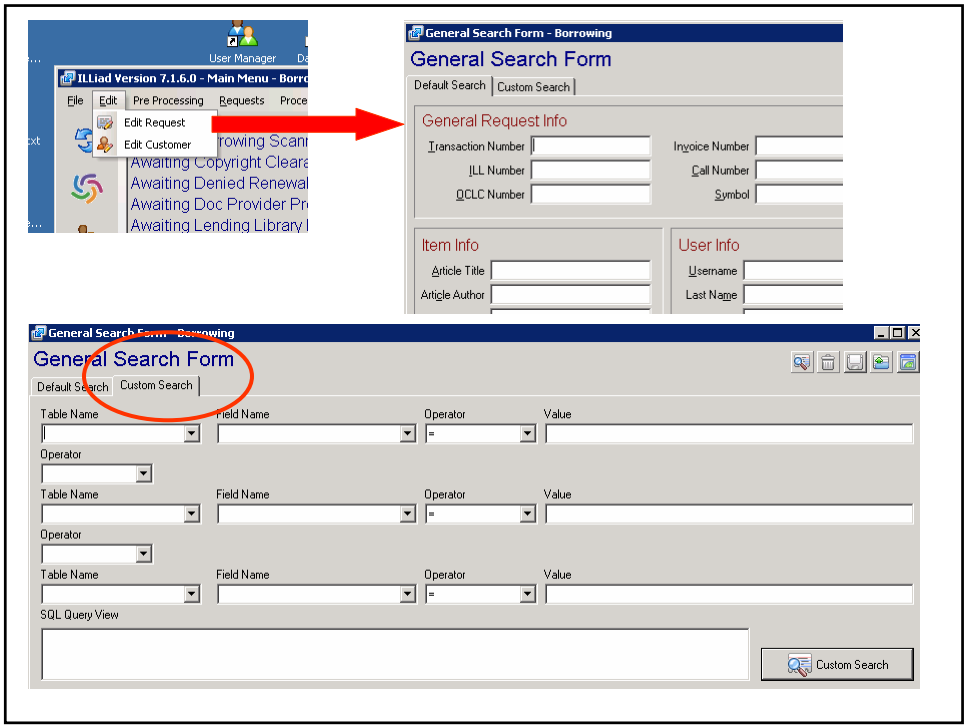


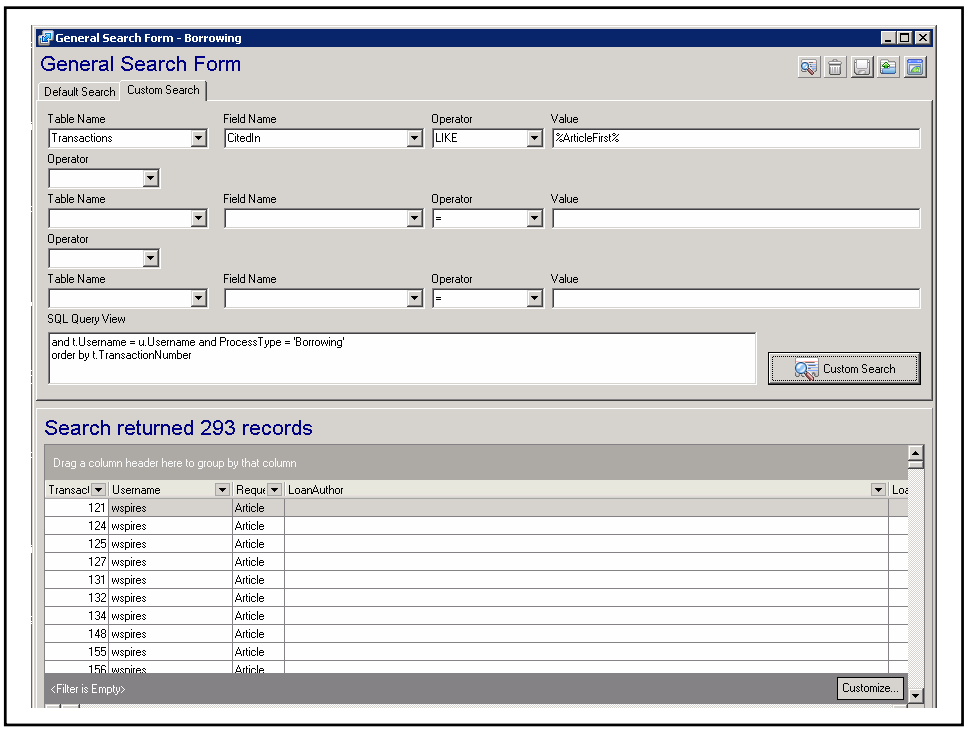
ILLiad Database : Tracking

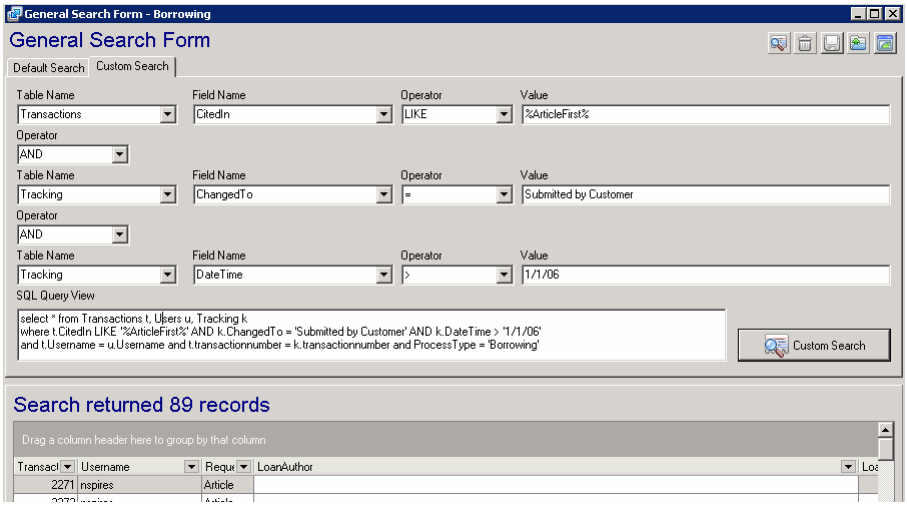


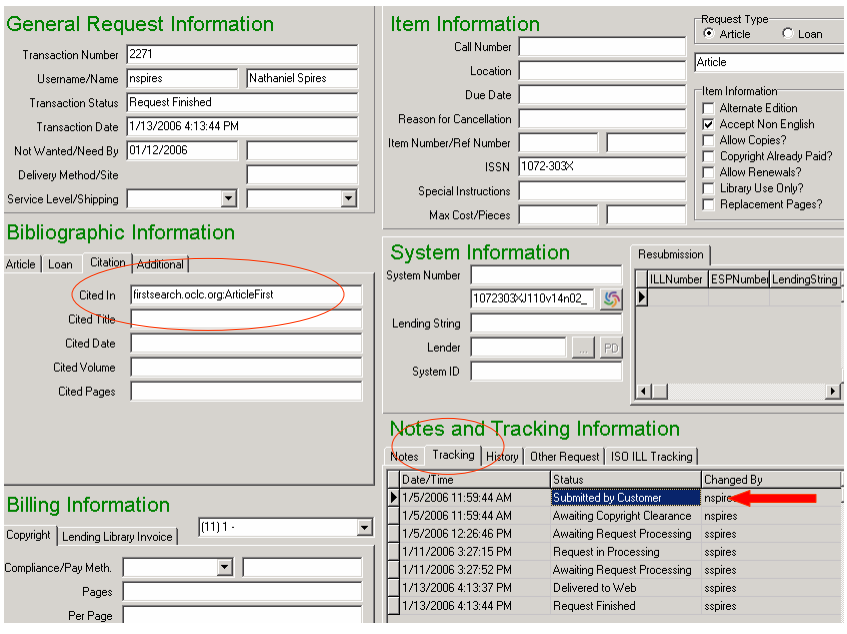
Data in Table 'Tracking' in 'OCLCTrainData' on '216.54.119.13'

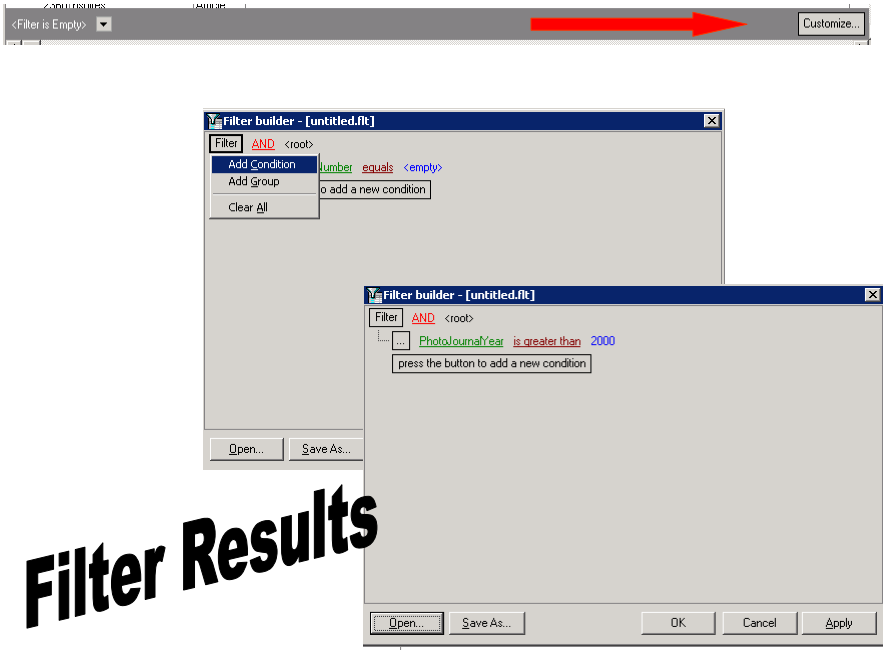
TransactionNumber	DateTime	ChangedTo	ChangedBy
0	5/13/2004 12:53:51 PM	Submitted by Customer	kposton
0	5/13/2004 12:53:51 PM	Awaiting Request Processing	kposton
1	5/13/2004 3:05:32 PM	Submitted by Customer	kposton
1	5/13/2004 3:05:32 PM	Awaiting Copyright Clearance	kposton
1	5/13/2004 5:10:02 PM	Awaiting Request Processing	genie
1	5/14/2004 9:19:51 AM	Odyssey Document Received	Odyssey
1	5/14/2004 9:19:55 AM	Delivered to Web	Odyssey
1	5/14/2004 9:44:34 AM	Odyssey Document Received	Odyssey
1	5/14/2004 9:44:35 AM	Delivered to Web	Odyssey
2	5/13/2004 3:06:17 PM	Submitted by Customer	kposton
2	5/13/2004 3:06:18 PM	Awaiting Copyright Clearance	kposton
2	5/13/2004 5:10:02 PM	Awaiting Request Processing	genie
2	5/14/2004 9:20:05 AM	Odyssey Document Received	Odyssey
2	5/14/2004 9:20:06 AM	Delivered to Web	Odyssey
2	5/14/2004 10:30:20 AM	Odyssey Document Received	Odyssey
2	5/14/2004 10:30:22 AM	Delivered to Web	Odyssey
2	6/17/2004 3:13:35 PM	Request Sent	genie
2	6/17/2004 3:14:07 PM	Awaiting Request Processing	genie

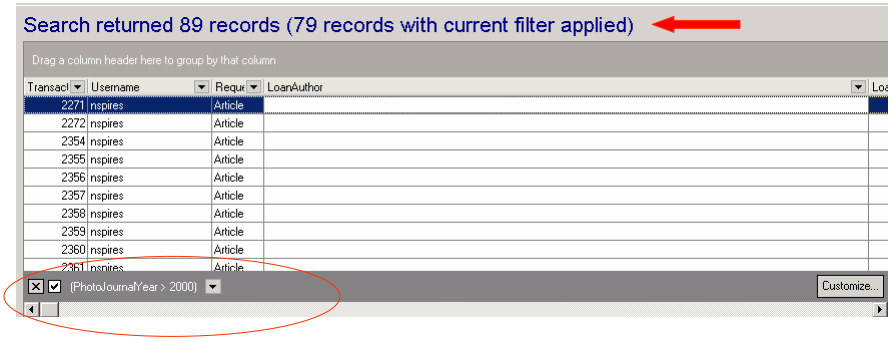

User Manager
ILLiad Version 7.1.6.0 - Main Menu - Borro
File
Edit
Pre Processing
Requests
Proce
Edit Request
Edit Customer
Awaiting Copyright Clear
Awaiting Denied Renewal
Awaiting Doc Provider Pr
Awaiting Lending Library
General Search Form - Borrowing
General Search Form
Default Search
Custom Search
General Request Info
Transaction Number
Invoice Number
ILL Number
Call Number
OCLC Number
Symbol
Item Info
Article Title
Article Author
User Info
Username
Last Name
General Search Form - Borrowing
General Search Form
Default Search
Custom Search
Table Name
Field Name
Operator
Value
SQL Query View
Custom Search

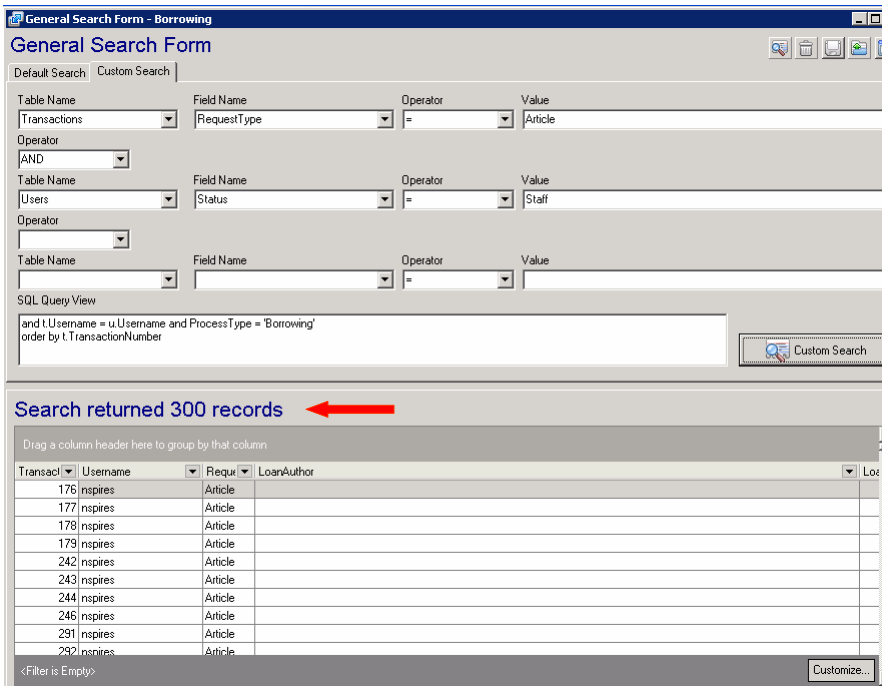

General Search Form - Borrowing
General Search Form
Default Search
Custom Search
Table Name
Transactions
Field Name
CitedIn
Operator
LIKE
Value
%ArticleFirst%
SQL Query View
and t.Username = u.Username and ProcessType = 'Borrowing'
order by t.TransactionNumber
Custom Search
Search returned 293 records
Drag a column header here to group by that column
Transact
Username
Reque
LoanAuthor
121 wspires Article
124 wspires Article
125 wspires Article
127 wspires Article
131 wspires Article
132 wspires Article
134 wspires Article
148 wspires Article
155 wspires Article
156 wspires Article
<Filter is Empty>
Customize...

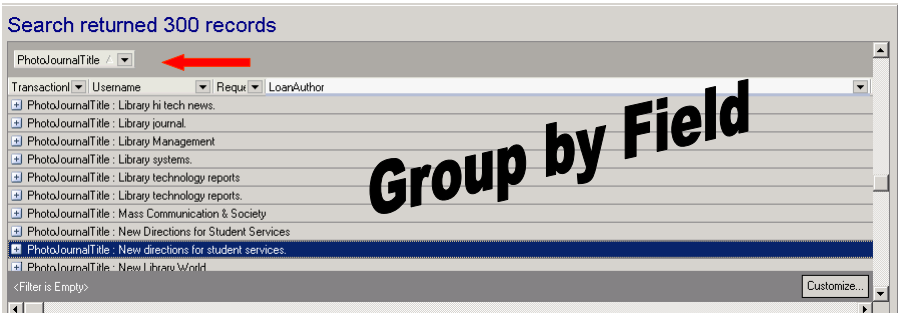

General Search Form - Borrowing
General Search Form
Default Search
Custom Search
Table Name
Field Name
Operator
Value
Transactions
CitedIn
LIKE
%ArticleFirst%
AND
Tracking
ChangedTo
=
Submitted by Customer
AND
Tracking
DateTime
>
1/1/06
SQL Query View
select * from Transactions t, Users u, Tracking k
where t.CitedIn LIKE '%ArticleFirst%' AND k.ChangedTo = 'Submitted by Customer' AND k.DateTime > '1/1/06'
and t.Username = u.Username and t.transactionnumber = k.transactionnumber and ProcessType = 'Borrowing'
Custom Search
Search returned 89 records
Drag a column header here to group by that column
Transacl
Username
Requ
LoanAuthor
2271
nspires
Article

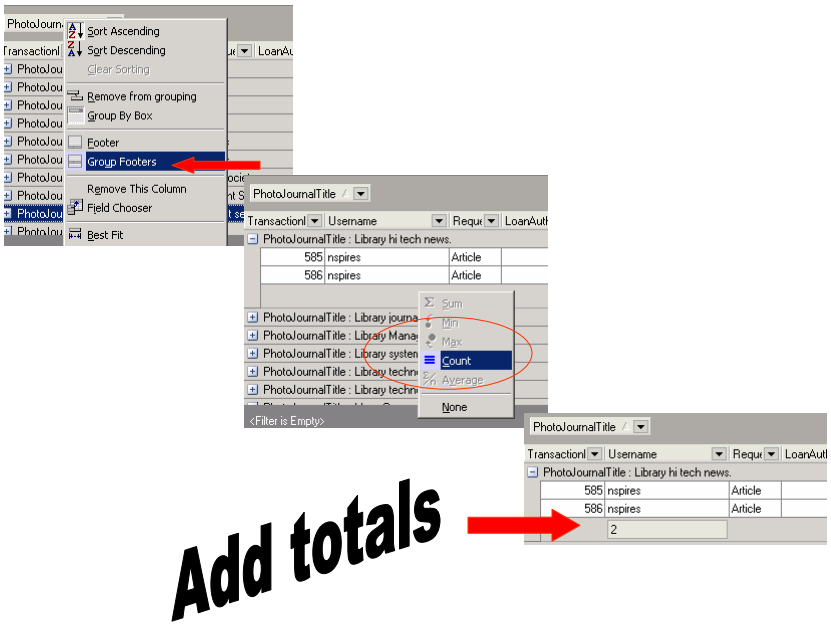

General Request Information
Transaction Number
2271
Username/Name
nspires
Nathaniel Spires
Transaction Status
Request Finished
Transaction Date
1/13/2006 4:13:44 PM
Not Wanted/Need By
01/12/2006
Delivery Method/Site
Service Level/Shipping
Item Information
Call Number
Location
Due Date
Reason for Cancellation
Item Number/Ref Number
ISSN
1072-303X
Special Instructions
Max Cost/Pieces
Request Type
Article
Loan
Article
Item Information
Alternate Edition
Accept Non English
Allow Copies?
Copyright Already Paid?
Allow Renewals?
Library Use Only?
Replacement Pages?
Bibliographic Information
Article
Loan
Citation
Additional
Cited In
firstsearch.oclc.org:ArticleFirst
Cited Title
Cited Date
Cited Volume
Cited Pages
System Information
System Number
1072303XJ110v14n02_
Lending String
Lender
System ID
Resubmission
ILLNumber
ESPNumber
LendingString
Notes and Tracking Information
Notes
Tracking
History
Other Request
ISO ILL Tracking
Date/Time
Status
Changed By
1/5/2006 11:59:44 AM
Submitted by Customer
nspires
1/5/2006 11:59:44 AM
Awaiting Copyright Clearance
nspires
1/5/2006 12:26:46 PM
Awaiting Request Processing
sspires
1/11/2006 3:27:15 PM
Request in Processing
sspires
1/11/2006 3:27:52 PM
Awaiting Request Processing
sspires
1/13/2006 4:13:37 PM
Delivered to Web
sspires
1/13/2006 4:13:44 PM
Request Finished
sspires
Billing Information
Copyright
Lending Library Invoice
(11) 1 -
Compliance/Pay Meth.
Pages
Per Page


Filter is Empty
Customize...
Filter builder - [untitled.flt]
Filter
AND
<root>
Add Condition
Add Group
Clear All
umber
equals
<empty>
o add a new condition
Open...
Save As...
Filter builder - [untitled.flt]
Filter
AND
<root>
PhotoJournalYear
is greater than
2000
press the button to add a new condition
Open...
Save As...
OK
Cancel
Apply
Filter Results


Search returned 89 records (79 records with current filter applied)
Drag a column header here to group by that column
Transact
Username
Requ
LoanAuthor
2271 nspires Article
2272 nspires Article
2354 nspires Article
2355 nspires Article
2356 nspires Article
2357 nspires Article
2358 nspires Article
2359 nspires Article
2360 nspires Article
(PhotoJournalYear > 2000)
Customize...


General Search Form - Borrowing
General Search Form
Default Search
Custom Search
Table Name
Field Name
Operator
Value
Transactions
RequestType
=
Article
Operator
AND
Table Name
Field Name
Operator
Value
Users
Status
=
Staff
Operator
Table Name
Field Name
Operator
Value
=
SQL Query View
and t.Username = u.Username and ProcessType = 'Borrowing'
order by t.TransactionNumber
Custom Search
Search returned 300 records
Drag a column header here to group by that column
Transacti
Username
Requi
LoanAuthor
176 nspires Article
177 nspires Article
178 nspires Article
179 nspires Article
242 nspires Article
243 nspires Article
244 nspires Article
246 nspires Article
291 nspires Article
<Filter is Empty>
Customize...


Search returned 300 records
PhotoJournalTitle
TransactionI
Username
Requi
LoanAuthor
PhotoJournalTitle : Library hi tech news.
PhotoJournalTitle : Library journal.
PhotoJournalTitle : Library Management
PhotoJournalTitle : Library systems.
PhotoJournalTitle : Library technology reports
PhotoJournalTitle : Library technology reports.
PhotoJournalTitle : Mass Communication & Society
PhotoJournalTitle : New Directions for Student Services
PhotoJournalTitle : New directions for student services.
PhotoJournalTitle : New Library World
<Filter is Empty>
Customize...
Group by Field



Basic ILLiad Searching

- **Custom Search Screen**
  - **Exporting**
  - **Saving custom queries**
  - **Loading custom queries**

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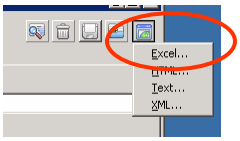
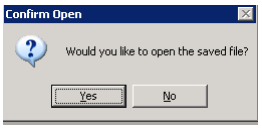
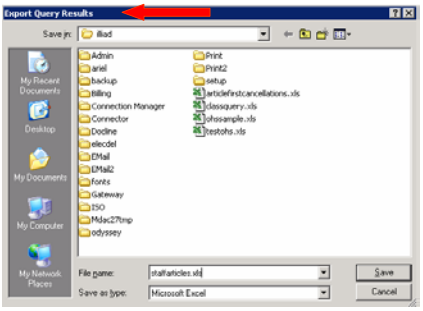
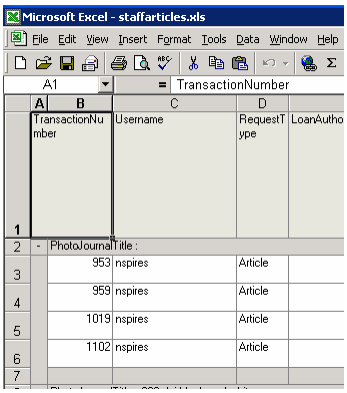
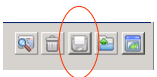


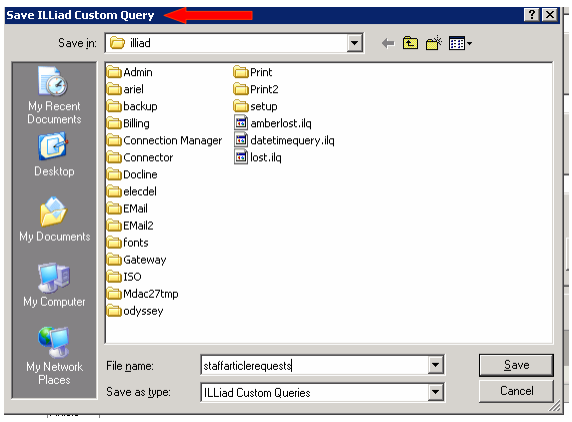
Export results



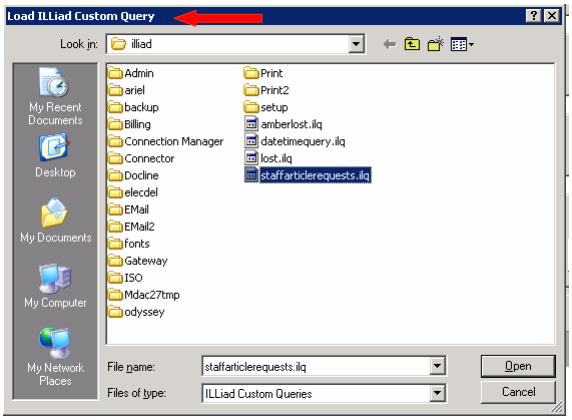








Save queries to use again



Open a saved query

- **Basic ILLiad Searching**
  - Data Display Grid
    - Right clicking in one of the grid's column headings will give you a dropdown menu with a number of display options for organizing the grid results
    - *Note: The settings do not change or remove data. They organize the display grid.*

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Basic ILLiad Searching

- **Data Display Grid**
  - **SORT ASCENDING**
  - **SORT DESCENDING**
  - **CLEAR SORTING**
  - **GROUP BY THIS FIELD**
    - Groups the results grid by the specified field.
    - You can also perform this function by dragging a column heading into the Group By Box.
  - **GROUP BY BOX**
    - Displays the Group By Box at the top of the grid, to which you may drag column headings to group the results grid by the specified heading(s).

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Basic ILLiad Searching

- **Data Display Grid**
  - **FOOTER**
    - Displays a footer at the bottom of the grid.
    - Right clicking in the footer beneath a specific column allows you to have the footer display the following information:
      - The Sum of the values contained in the selected column.
      - The Min (minimum value) of the values contained in the selected column.
      - The Max (maximum value) of the values contained in the selected column.
      - The Count of the values contained in the selected column.
      - The Average of the values contained in the selected column.

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Basic ILLiad Searching

- **Data Display Grid**
  - **GROUP FOOTERS**
    - When you are grouping the results grid by a specific column heading, this displays a footer at the bottom of each group in the display grid.
    - Right clicking in the footer beneath a specific column allows you to have the footer display the following information:
      - The Sum of the values contained in the group.
      - The Min (minimum value) of the values contained in the group.
      - The Max (maximum value) of the values contained in the group.
      - The Count of the values contained in the group.
      - The Average of the values contained in the group.

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Basic ILLiad Searching

- **Data Display Grid**
  - **Applying Filters**
    - The actual query being run against the database to get the results set has not changed. The filter is a function of the ILLiad Client. It simply shows you the results through whatever filter you choose to apply.
  - **Clearing Filters**
    - If at any point you need to clear an existing filter from the form, click the Clear Filter button (the X in a box) on the bottom left side of the screen. This will remove any filter information that you have entered and return you to the default empty filter.

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Basic ILLiad Searching

- **Need More Power?**
  - Try the Microsoft Access Link to your ILLiad Database
    - See the Reporting and Statistics Guide

Questions & Answers

Resources

- Documentation and Knowledge Base
  - http://www.atlas-sys.com/Documentation.html
- Newsletter
  - http://www.atlas-sys.com/Newsletters.html
- OCLC Product Pages

http://www.oclc.org/illiad , http://www.oclc.org/ill/default.htm

- Listserv
  - http://listserv.vt.edu/archives/illiad-l.html
- Community
  - http://www.atlas-sys.com/community/
- Support
  - support@oclc.org

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