

Custom Searching in the OCLC ILLiad Client



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>



Basic ILLiad Searching

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



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

Data in Table 'Transactions' in 'OCLCTrainData' on '216.54.119.13'

TransactionNumber	Username	RequestType	LoanAuthor	LoanTitle	LoanPublisher	LoanP
0	lposton	Loan				
1	lposton	Article				
2	lposton	Article				
3	lposton	Article				
4	lposton	Article				
9	lposton	Loan	Bob Barker	Secrets of the P		
10	lposton	Loan	Judge Judy	Court's in Sessio		
11	lposton	Loan	Mr. T	Goes to the Bank		
12	lposton	Loan	Bob Barker	I don't want gre		
13	lposton	Loan	Walker, Alice	In search of our		
14	sspires	Article				
15	sspires	Loan	Lobel, Arnold	Frog and toad to		

Table Properties - Transactions

General

Name: Transactions

Owner: dbo

Create date: 5/12/2004 10:16:23 AM

Filegroup: PRIMARY

Rows: 617

Key	ID	Name	Data Type	Size	Nuls	Default
		TransactionNumber	int	4	<input type="checkbox"/>	
		Username	varchar	20	<input type="checkbox"/>	
		RequestType	varchar	8	<input checked="" type="checkbox"/>	
		LoanAuthor	varchar	100	<input checked="" type="checkbox"/>	
		LoanTitle	varchar	255	<input checked="" type="checkbox"/>	
		LoanPublisher	varchar	50	<input checked="" type="checkbox"/>	
		LoanPlace	varchar	30	<input checked="" type="checkbox"/>	

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

ILLiad Database : Users

Data in Table 'UsersALL' in 'OCLCTrainData' on '216.54.119.13'

UserName	LastName	FirstName	SSN	Status	EmailAddress	Phone	Department	NVTGC
ALTON	User	ALTON	123123123	None	<NULL>	<NULL>	None	ALTON
bill	Billing	Bill	1234	Graduate	sspires@atlas-sys.1	800-567-7401	Other - Unlisted	WOLFGANG
billme	Billingley	Bill	1234	Undergraduate	sspires@atlas-sys.1	800-567-7401	Other - Unlisted	WOLFGANG
bspires	Spires	Brett	123456	Graduate				
cathyk	Kellum	Cathy	3889	Choose a Status				
EMERIL	User	EMERIL	123123123	None				
kellumc	Kellum	Cathy	3889	Choose a Status				
lposton	Poston	Kathy	123123123	Undergraduate				
Lending	User	Lending	123123123	Staff				
napier	Spires	Napier	6461615	Staff				
nspires	Spires	Nathaniel	1234	Staff				
PAULA	User	PAULA	123123123	None				
pearsonj	Pearson	Jennifer	5267	Choose a Status				
RACHEL	User	RACHEL	123123123	None				
sandjpearson	Pearson	Jennifer	427512639	Choose a Status				

Table Properties - UsersALL

General

Name: UsersALL

Owner: dbo

Create date: 5/12/2004 10:16:24 AM

Filegroup: PRIMARY

Rows: 24

Key	ID	Name	Data Type	Size	Nuls	Default
		UserName	varchar	20	<input type="checkbox"/>	
		LastName	varchar	40	<input type="checkbox"/>	
		FirstName	varchar	40	<input type="checkbox"/>	
		SSN	varchar	20	<input checked="" type="checkbox"/>	
		Status	varchar	15	<input checked="" type="checkbox"/>	
		EmailAddress	varchar	50	<input checked="" type="checkbox"/>	
		Phone	varchar	15	<input checked="" type="checkbox"/>	

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 Box 450	
a3e	1	ALTON	University Library, Prescott College	Prescott	Prescott
a3e	1	EMERIL	University Library, Prescott College	Prescott	Prescott
a3e	1	ILL	University Library, Prescott College	Prescott	Prescott
a3e	1	PAULA	University Library, Prescott College	Prescott	Prescott
a3e	1	RACHEL	University Library, Prescott College	Prescott	Prescott
a3e	1	WOLFGANG	University Library, Prescott College	Prescott	Prescott
a3e	1	YAN	University Library, Prescott College	Prescott	Prescott
A3U	1	ALTON	Library, ILL	Arizona State Univ 7001 E	
A3U	1	EMERIL	Library, ILL	Arizona State Univ 7001 E	
A3U	1	ILL	Library, ILL	Arizona State Univ 7001 E	

Table Properties - LenderAddressesALL

General

Name: LenderAddressesALL Permissions...

Owner: dbo
 Create date: 5/12/2004 10:16:21 AM
 Filegroup: PRIMARY
 Rows: 25492

Columns:

Key	ID	Name	Data Type	Size	Nuls	Default
		LenderString	varchar	16	<input type="checkbox"/>	
		AddressNumber	float	8	<input type="checkbox"/>	
		NVTGC	varchar	20	<input type="checkbox"/>	
		LibraryName	varchar	40	<input checked="" type="checkbox"/>	
		Address1	varchar	80	<input checked="" type="checkbox"/>	
		Address2	varchar	80	<input checked="" type="checkbox"/>	
		Address3	varchar	80	<input checked="" type="checkbox"/>	

OK Cancel Apply Help

Note: May be LenderAddressesALL for SSS
 LenderString, AddressNumber, NVTGC important here

ILLiad Database : Tracking

Table Properties - Tracking

General

Name: Tracking Permissions...

Owner: dbo
 Create date: 5/12/2004 10:16:23 AM
 Filegroup: PRIMARY
 Rows: 3203

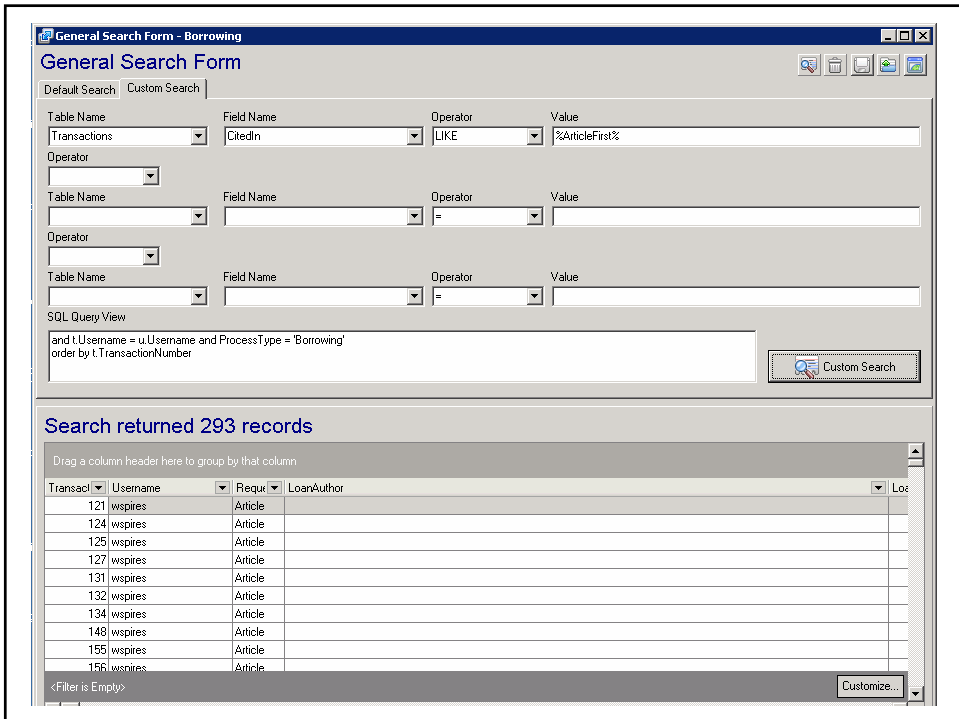
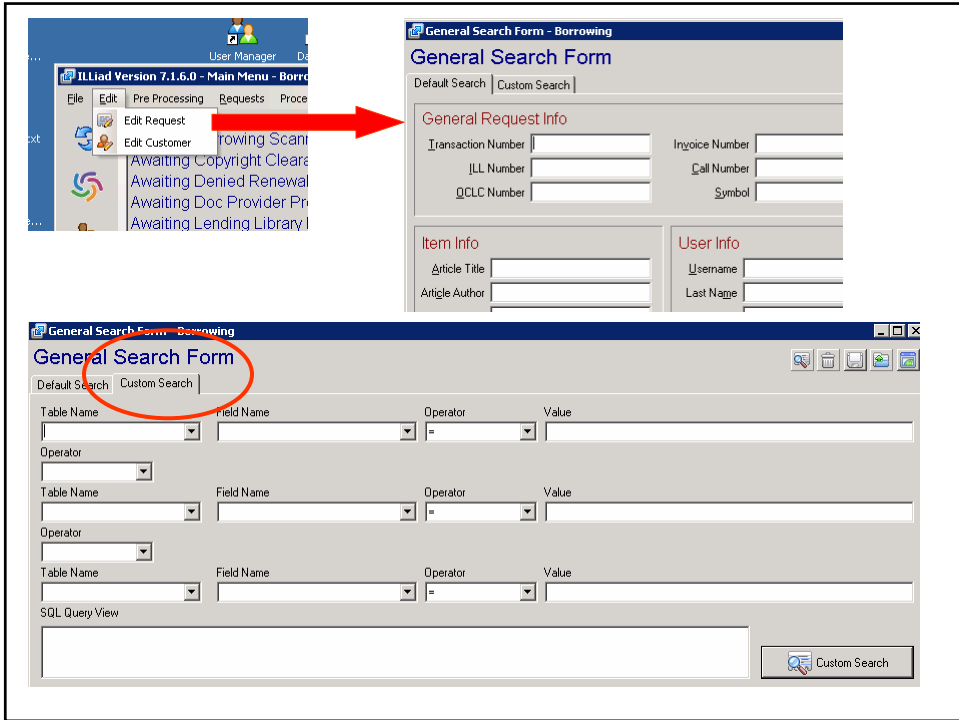
Columns:

Key	ID	Name	Data Type	Size	Nuls
		TransactionNumber	float	8	<input type="checkbox"/>
		DateTime	datetime	8	<input type="checkbox"/>
		ChangedTo	varchar	40	<input type="checkbox"/>
		ChangedBy	varchar	20	<input checked="" type="checkbox"/>

OK Cancel Apply

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



General Search Form - Borrowing

General Search Form

Default Search | Custom Search

Table Name: Transactions | Field Name: CitedIn | Operator: LIKE | Value: %ArticleFirst%

Operator: AND

Table Name: Tracking | Field Name: ChangedTo | Operator: = | Value: Submitted by Customer

Operator: AND

Table Name: Tracking | Field Name: DateTime | Operator: > | Value: 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

Transact	Username	Requ	LoanAuthor	Loc
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	nspires
1/11/2006 3:27:15 PM	Request in Processing	nspires
1/11/2006 3:27:52 PM	Awaiting Request Processing	nspires
1/13/2006 4:13:37 PM	Delivered to Web	nspires
1/13/2006 4:13:44 PM	Request Finished	nspires

Billing Information

Copyright: Lending Library Invoice | (1) 1 -
 Compliance/Pay Meth.:
 Pages:
 Per Page:

2000 ISSUES 10/01/05

<Filter is Empty> Customize...

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	Lo
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		
2361	nspires	Article		

(PhotoJournalYear > 2000) Customize...

General Search Form - Borrowing

Default Search Custom Search

Table Name: Transactions Field Name: RequestType Operator: = Value: Article

Operator: AND

Table Name: Users Field Name: Status Operator: = Value: 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

Transac	Username	Requi	LoanAuthor	Loa
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		
292	nspires	Article		

<Filter is Empty> Customize...

Search returned 300 records

PhotoJournalTitle / ←

Transaction | 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

The screenshot shows a software interface with a menu on the left containing options like 'Sort Ascending', 'Sort Descending', 'Clear Sorting', 'Remove from grouping', 'Group By Box', 'Footer', 'Group Footers', 'Remove This Column', 'Field Chooser', and 'Best Fit'. A red arrow points to 'Group Footers'. A context menu is open over a table, with 'Count' selected. The table below shows data for 'PhotoJournalTitle : Library hi tech news.' with two rows of data and a total row. A red arrow points from the text 'Add totals' to the total row.

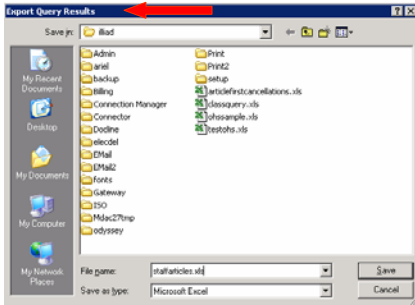
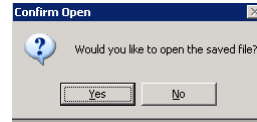
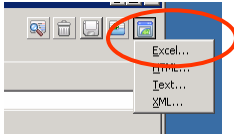
PhotoJournalTitle : Library hi tech news.		Article	
585	inspires	Article	
586	inspires	Article	
		2	

Add totals →

Basic ILLiad Searching

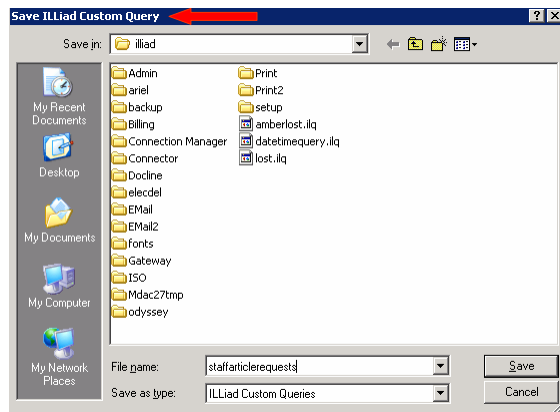
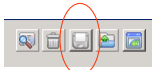
- Custom Search Screen
 - Exporting
 - Saving custom queries
 - Loading custom queries

Export results

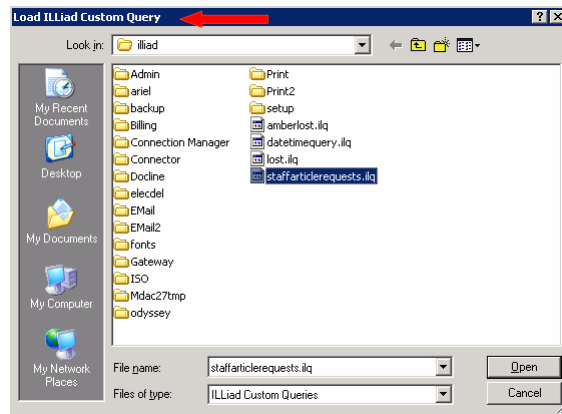
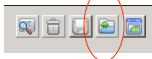


Microsoft Excel - staffarticles.xls

TransactionNumber			
A	B	C	D
TransactionNumber	Username	RequestType	LoanAutho
1			
2	- PhotoJournal Title :		
3	953	inspires	Article
4	959	inspires	Article
5	1019	inspires	Article
6	1102	inspires	Article
7			



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.*



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).



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.



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.



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.



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



THANK
YOU



