

Sending New & Updated MARC Records to Summon (daily):

In Create Lists, run a search using the saved query "summon new/updated," changing the "UPDATED" date to the last date the search was previously run (usually the previous day). This query identifies any records created or updated on or after the date specified that are not Serials Solutions records and are not for ILL borrowed materials. (Summon identifies records within this file as deleted by MARC field 998 \$e = n (this corresponds to BCODE3 = n in Sierra)).

As of March 2017 we no longer need to exclude the "dummy" bib records for databases because these have their own suppression code, "s," which is not read as a delete by Summon.

The screenshot shows the 'Boolean Search' window with the following fields and controls:

- Review File Name:
- Store Record Type:
- Range: Start Stop
- Table with columns: Term, Operator, Type, Field, Condition, Value A, Value B. Row 1 contains the number '1'.
- Buttons on the right: Group, Ungroup, Insert Line, Append Line, Delete, Clear All.
- Buttons at the bottom: Search, Use Existing Search, Retrieve Saved Query, Save, Save As, Close.

A red arrow points to the 'Retrieve Saved Query' button.

Summon Update

Store Record Type: BIBLIOGRAPHIC b

Range Start b10000008 Stop b90853933

Classic

Enhanced

JSON

Te...	Operat...	Type	Field	Condi...	Value A	Value B
1		BIBLI...	UPDA...	greate...	03-30-2017	- -
2	AND	(BIBLI...	CAT L...	not eq... s	
3	AND	BIBLI...	LOCA...	not eq... ill)

BIBLIOGRAPHIC UPDATED greater than or equal to "03-30-2017" AND (BIBLIOGRAPHIC CAT LEVEL not equal to "s" AND BIBLIOGRAPHIC LOCATION not equal to "ill ")

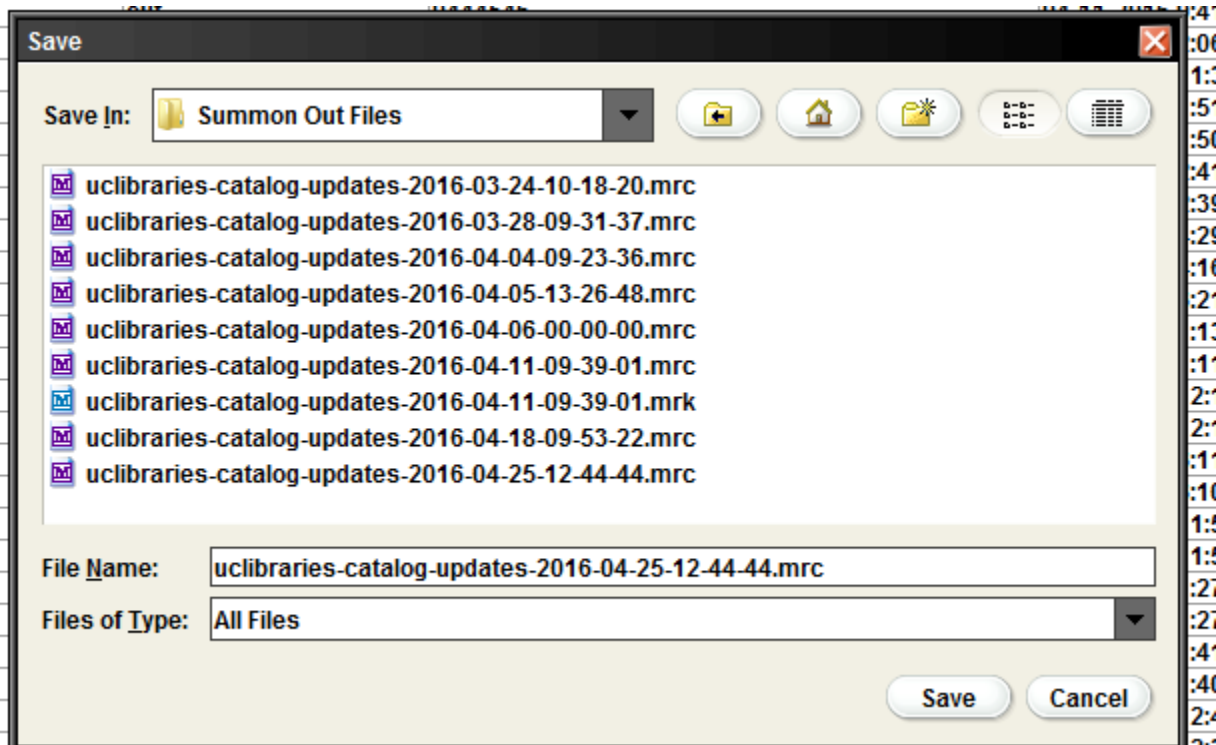
OK

In [Data Exchange](#) create an out file using the "Create B" option. Put this file to your computer ("Put PC") and when you do, name it according to the Summon conventions.

([sourceid-catalog-updates-2011-01-26-13-18-58.mrc](#)

e.g., "uclibraries-catalog-updates-yyyy-mm-dd-hh-mm-ss)

If you use the file extension ".mrc" when saving the file, it will be ready to upload directly to Summon.



Upload this file to the Proquest ftp server

FTP Host: xxxxxxxx

Username: xxxxxxxx

Password: xxxxxxxx

Database records:

Once weekly, run a list of any updated bib records with "summon database" in a 956. Edit the .mrc file so that the LEADER position 5 = c instead of d, and the 998\$c = " ". Append these records to the regular updates for the day.

Deletes:

Once weekly, run a list of records with 948=delete, last updated before the current week.

The screenshot shows a 'Boolean Search' window with the following fields and controls:

- Review File Name: "deletes" to delete
- Store Record Type: BIBLIOGRAPHIC b
- Review (highlighted dropdown)
- Review file: 153. summon "deletes" 20160119 (935) (BIBLIOGRAPHIC)

Term	Operator	Type	Field	Condition	Value A	Value B
1		b	MARC Tag 9...	equal to	adelete	

BIBLIOGRAPHIC MARC Tag 948 equal to "|adelete"

Buttons on the right: Group, Ungroup, Insert Line, Append Line, Delete, Clear All

Buttons at the bottom: Search, Use Existing Search, Retrieve Saved Query, Save, Save As, Close

In Delete Records, delete these [Delete the listed BIBLIOGRAPHIC record AND all attached records]

Review file: 22. "deletes" to delete (4) (BIBLIOGRAPHIC) Start

Delete the listed BIBLIOGRAPHIC record ONLY (if no other records attached)

Delete the listed BIBLIOGRAPHIC record AND all attached records

Delete Records

	Record	Description
1	b23377604	Forest Products Research Conference, 1986 : matching utilization research with the needs of timber managers : October 21-23, 1986, Forest Products Laboratory, Madison, WI
2	b2489895x	Forest Products Research Conference, 1985 : cooperative research in a competitive world : Forest Products Research Conference, October 22-24, 1985, Forest Products Laboratory, Madison, WI
3	b8487049x	State forest tax law digest, 1967 / Ellis T. Williams
4	b84961272	Rudiments of Ramsey theory.

Default Content Types (changes in yellow)

Summon Content Type Mapping

Default linking for all content types except eBook, eJournal, and Journal is to the OPAC record. For eBook, eJournal, and Journal, default linking uses the 856\$u URL in the record if there is only one, otherwise reverts to the OPAC record. Please add linking rule change requests in the Notes column.

Content Type	Default MARC Field Mapping	Exclude from Mapping	Additional Mapping	Notes
Archival Material	Leader(06) = p			
Audio Recording	007(00) = s OR Leader(06) = i OR Leader(06) = j			
Book	Leader(06-07) = aa OR Leader(06-07) = ab OR Leader(06-07) = ac OR Leader(06-07) = ad OR Leader(06-07) = am			
Computer File	008(26) = a, b, c, d, e, f, g, m OR z OR Leader(06) = m			
Conference Proceeding	008(29) = 1			
eBook	Leader(06-07) = am AND 007(00-01) = cr OR Leader(06-07) = am AND 008(23) = s OR o			change to?Leader(07) = am AND 007(01) = cr OR Leader(06-07) = am AND 008(23) = s OR o
eJournal	Leader(06-07) = as AND 007(00-01)			

	= cr OR Leader(06-07) = as AND 008(23) = s OR o			
Government Document	008(28) = a, c, f, i, l, m, o, s, OR z AND Leader(06) = a AND 26x\$b does not contain 'University or Press'			
Image	Leader(06) = k			
Journal	Leader(06-07) = as			
Kit	007(00) = o OR Leader(06) = o			
Manuscript	Leader(06) = t			
Map	007(00) = a OR Leader(06) = e OR Leader(06) = f			
Microfilm/Microform (Please Specify)	007(00) = h OR 008(23) = a OR 008(23) = b OR 008(23) = c			
Music Score	007(00) = q OR Leader(06) = c OR Leader(06) = d			
Newspaper	008(21) = n AND Leader(07) = s			
Realia	Leader(06) = r			

Thesis/Dissertation	502 field (Dissertation Note) is present OR (008(24-27) = m AND Leader(06-07) = am)			
Video Recording	007(00) = m OR 007(00) = v OR Leader(06) = g			
Web Resource	007(00) = c OR 008(23) = s OR 008(26) = i OR 008(26) = j OR Leader(06-07) = ai	Leader(06-07) = ai	change to 007(00) = c AND 007(01) = r, add OR 008(23) = o	
Library Holding	None of the above			

Additional Available Content Types	
Content Type	Custom Mapping
Album	do not map
Architectural Drawing	do not map
Art	do not map
Artifact	do not map
Atlas	do not map
Audio Tape	337 \$a=audiocassette
Blueprints	300 \$b has blueprint(s) or blueline(s)
Book Chapter	do not map
Book Review	do not map
Case	do not map
Catalog	do not map
Ceremonial Object	do not map
Citation	do not map
Clothing	do not map
Compact Disc	007 (06)=g
Course Reading	do not map
Data Set	do not map
Database	6xx \$v Databases
Drawing	do not map
DVD	do not map
Electronic Resource	do not map
Equipment	do not map
Exam	do not map
Film	LDR 06=g AND (338\$a=film reel OR 337\$a=projected)
Film Script	do not map
Filmstrip	do not map
Finding Aid	do not map
Furnishing	do not map
Globe	007 (00) = d OR (336\$a=cartographic three-dimensional form AND 338\$a=object)
Graphic Arts	do not map
Houseware	do not map
Implements	do not map
Interactive Media	do not map
Journal Article	do not map
Magazine	do not map
Magazine Article	do not map
Market Research	do not map

Model	do not map
Music Manuscript	LDR (06)=d
Music Recording	ARL stat=j
Musical Instrument	do not map
Newsletter	do not map
Newspaper Article	do not map
Painting	do not map
Pamphlet	do not map
Paper	do not map
Patent	do not map
Personal Article	do not map
Personal Narrative	do not map
Photograph	do not map
Poem	do not map
Postcard	do not map
Poster	do not map
Play	do not map
Presentation	do not map
Publication	do not map
Publication Article	do not map
Reference	do not map
Report	do not map
Sheet Music	099 starts with musicpop
Slide	do not map
Special Collection	do not map
Spoken Word Recording	do not map
Standard	650 \$x Standards OR 008 24-27 contains "u"
Streaming Audio	do not map
Streaming Video	do not map
Technical Report	do not map
Tool	do not map
Trade Publication	do not map
Trade Publication Article	do not map
Transcript	do not map

Summon MARC21 Mapping						
Summon Field Name	Summon Display Name	Display Location	Facet	Corresponding MARC Fields	Changes/Corrections?	Additional changes
Abstract	Abstract	Brief and Preview		520 \$a\$b	Display in preview only, not brief	
Author	Author	Facet, Brief, and Preview	Author	100 \$a\$b\$c; 700 \$a\$b\$c		
Corporate Author	Corporate Author	Brief and Preview		110\$a \$b \$c \$n, 710\$a \$b \$c \$n		
Document Title : Document Subtitle	Maps to Title field	Preview		245 \$a, 245 \$b	ADD 245 \$n, \$p, and 880 \$6245 for title; Display title in brief	
Edition	Maps to Edition field	Preview		250 \$a		
Genre	Genre	Facet, Preview	Genre	600 \$v; 610 \$v; 611 \$v; 630 \$v; 648 \$v; 650 \$v; 651 \$v; 655 \$a\$v, 380 \$a		
ISBN	ISBN	Brief and Preview		020 \$a	Display in preview only, not brief	add 776 \$z
ISSN	ISSN	Brief and Preview		022 \$a		add 776 \$x
LCCallNum	Call Num	Brief and Preview		099\$a\$b; 090\$a\$b; 050\$a\$b	ADD 086 \$a	
PageCount	Pages	Brief and Preview for Content Type = Book only		300 \$a	Display in preview only, not brief	
PublicationSeriesTitle	Series	Preview		440 \$a; 490 \$a;		
Publisher	Publisher	Preview		260 \$b, 264--1 \$b (2nd indicator=1)		
URL	Hyperlinked to title	n/a		856 \$u		
Volume (of series)	Volume	Brief and Preview		440 \$v; 490 \$v; 830 \$v		
ContentType	See Content Type Mapping	Facet, Brief, and Preview	Content Type	See Content Type Mapping worksheet		

	worksheet					
Language	Language	Facet/Preview	Language	008 (35-37); 041\$a\$b\$d\$e\$f\$g\$j		
Library Location	Library Locations provided by institution	Facet	Library Location	<i>Provided prior to initial ingest of records.</i>		
PublicationDate	Date	Facet, Brief and Preview	Publication Date	260 \$c, 264--1 \$c (2nd indicator=1), 264--4 \$c (2nd indicator=4)		
Subject terms	Subject	Facet, Preview	Subject Terms	600 \$x; 610 \$x; 611 \$x; 630 \$x; 648\$x; 650 \$a\$b\$c\$d\$x; 651 \$x; 653 \$a	ADD 600 \$a\$b\$c\$d ; 610 \$a\$b; 611 \$a\$n\$c\$d\$e\$q\$p; 630 \$a ; 651 \$a	
AuthorAffiliation	n/a	Index Only		100 \$u; 110 \$u; 111 \$u; 600 \$u; 610 \$u; 611 \$u; 700 \$u; 710 \$u; 711 \$u		
CODEN	n/a	Index Only		030 \$a		
Deleted Record Field	n/a	Index Only		<i>Only for Option 1 delete method. Provided prior to initial ingest of records.</i>		
Dewey Decimal Number	n/a	Index Only unless enabled in Admin Console		082 \$a	ADD 092 \$a	
DocumentTitleAlternate	n/a	Index Only		130\$a\$d\$f\$k\$l\$m\$n\$o\$p\$r\$s; 210 \$a\$b; 222 \$a\$b; 240\$a\$d\$f\$k\$l\$m\$n\$o\$p\$r\$s; 242 \$a\$b\$n\$p; 246 \$a\$b\$f\$i\$n\$p; 600\$t; 610 \$t; 611 \$t; 630 \$a\$d\$f\$h\$k\$l\$n\$o\$p\$r\$s; 730 \$a\$d\$f\$k\$l\$m\$n\$o\$p\$r\$s, 740 \$a\$n\$p		Add also 505 \$t, 970 \$t, 700\$t, 246 \$a, 247\$a
GeographicLocations	n/a	Facet	Region	600 \$z;610 \$z;611 \$z;630 \$z;648 \$z; 650\$z; 651 \$a; 655\$z		
InternationalArticleNumber (EAN)	n/a	Index Only		024-3\$a (1st indicator=3)	as of 3/17: 024\$a (any	WAS: 024-3\$a (1st

					indicators) ; 027\$a ; 088\$a	indicator=3) CHANGED TO: 024\$a (any indicators) ; 027\$a ; 088\$a (03/2017) based on feedback from Engineering (searching standard numbers is challenging)
LCCN	n/a	Index Only		010 \$a		
Meeting Name	n/a	Brief, Preview for Conference Proceeding content type; otherwise Index Only		111 \$a; 611 \$a; 711 \$a; 811 \$a.		
Notes	n/a	Index Only		500 \$a, 502 \$a; 362 \$a; 506 \$a; 510 \$a; 511 \$a; 518 \$a; 530 \$a; 533 \$a; 534 \$a; 538 \$a; 583 \$a; \$x\$z		remove 362 \$a from display
OCLC number	n/a	Index Only		035 \$a	ADD 001	
PublicationPlace	n/a	Index, Catalog Detail Page		260 \$a, 264--1 \$a (2nd indicator=1)		

PublicationSeriesTitle Alternate	n/a	Index Only		440 \$p; 760 \$a\$t; 762 \$a\$t; 800 \$a\$b\$c\$d\$e\$m\$n\$o\$p \$q\$r\$s\$t; 810 \$a\$b\$c\$d\$e\$m\$n\$o\$p \$r\$s\$t; 811 \$a\$c\$d\$e\$n\$p\$q\$s\$t; 830 \$d\$m\$n\$o\$p\$r\$s\$t		
RelatedCompanies	n/a	Index Only		610 \$a\$b\$c\$d\$n\$p\$q; 810 \$a		
RelatedPersons	n/a	Index Only		600 \$a\$b\$c\$d\$q; 800\$a\$b\$c\$d\$q		
RestrictionsOnAccess	n/a	Index Only		506 \$a; 540 \$a		
Table of contents	n/a	Index Only		505 \$a\$g\$r\$t	ADD 970 \$t\$c\$f	
TemporalSubjectTerms	n/a	Facet	Time Period	600 \$d\$y; 610\$y; 611\$y; 630\$y; 648 \$a\$y; 650 \$y; 651 \$y; 655 \$y		
Unique Record ID	n/a	n/a		<i>Provided prior to initial ingest of records.</i>		