Sierra to External Discovery : Travelling from Mountain to the Sea Without Losing Data
IUG – April 2017

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Systems Librarian, Chalmers University of Technology

The session will focus on optimal MARC mapping and data transfer/synchronization from Sierra MARC records via Create Lists/Data Exchange to output for the Summon KB and its indexing. Tips and tricks, including using the Scheduler.

Susan's Notes – Using Create Lists for Manual Synchronization

EVALUATE: What files should be suppressed/deleted; Who can Delete

Examples: No restrictions/suppressions on Orders, Patron, Faculty Reserve, Holdings/Copy; Restrictions are imposed on Bib, Item, Multiple flavors of suppression exist for various reasons (storage, keep it but hide it, temporarily withdrawn, mending, DELETE-ME) . Check all user profiles.

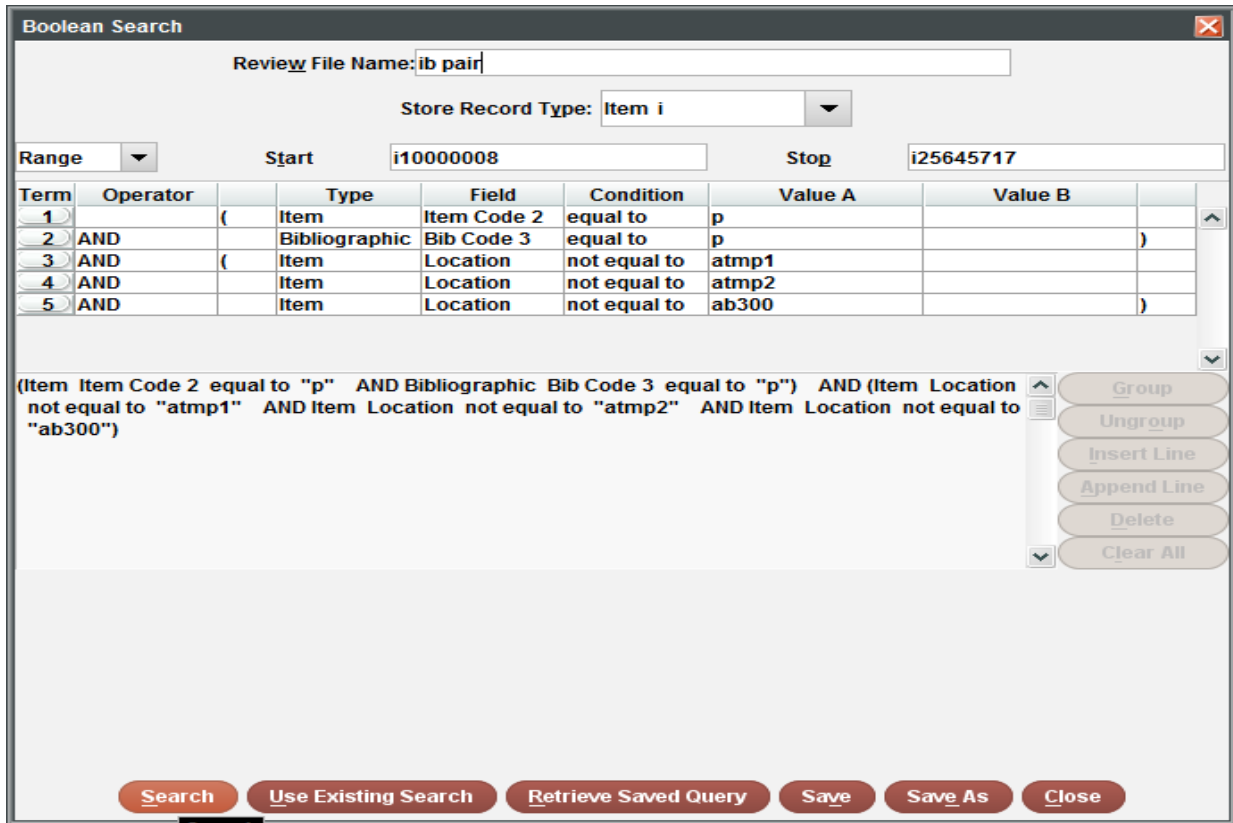**EVALUATE: Review suppressions for incorrect or incomplete information**

- suppressed bibs with active copy records still attached
- bibs with orders which have not yet been received
- items suppressed but still on course reserves
- items suppressed but still checked out
- items suppressed but with active holds
- items suppressed but with active serial holdings record
- bibs with an item location code in the bib location field
- items with a bib location code in the item location field
- Bibs with no 049 tag or no linked records
- Suppressed items/bibs with incorrect suppression code assigned

09		0	1000		empty	
10		0	1000		empty	
11	SJ - Active Items with Suppressed Bibs	1	500	i	complete	sj
12	SJ - Items with Bib Location Code	70	500	i	complete	sj
13	SJ - Bibs with Item Code	29	500	b	complete	sj
14	SJ - P Bibs with Active Items	5	500	b	complete	sj
15	SJ - Items Checked out with status of P	0	500	i	complete	sj
16	SJ - Empty Item Location	0	500	i	complete	sj
17	SJ - Empty Item Type	0	500	i	complete	sj
18	URL Verification Errors (Interactive) (11-08-2016)	166	500	b	complete	sj
19	sjmu	4	500	b	complete	sj
20	sju	2159	5000	b	complete	sj

EVALUATE: Fields to Output to Excel

Bib location, bib record ID; 049 tag; 001 tag; title; Item location; Item Record ID: Item call#; date added; linked record ids; status. We output 001 and identifying call number information as a backup, so that if a set of records is incorrectly deleted, we have 001 to re-locate the bib records and item call numbers to pull the books back to cataloging should we need to correct mistakes. KNOCK ON WOOD IF THIS HOPEFULLY NEVER HAPPENS TO YOU ;-)

IDENTIFY: item and bib pairs (IBP) where both (bibcode3, icode2) = "p".

Boolean Search

Review File Name: ib pair

Store Record Type: Item i

Range | Start i10000008 | Stop i25645717

Term	Operator		Type	Field	Condition	Value A	Value B	
1		(	Item	Item Code 2	equal to	p		
2	AND		Bibliographic	Bib Code 3	equal to	p		)
3	AND	(	Item	Location	not equal to	atmp1		
4	AND		Item	Location	not equal to	atmp2		
5	AND		Item	Location	not equal to	ab300		)

(Item Item Code 2 equal to "p"   AND Bibliographic Bib Code 3 equal to "p")   AND (Item Location not equal to "atmp1"   AND Item Location not equal to "atmp2"   AND Item Location not equal to "ab300")

Group
Ungroup
Insert Line
Append Line
Delete
Clear All

Search   Use Existing Search   Retrieve Saved Query   Save   Save As   Close

- Review these to check for linked records that might impede discard.
- Save these as item file discards in create lists <IB Pair ITEM>.
- Run a parallel review file of these as bibs <IB Pair ITEM-BIB>.

135		0	10000		empty
136		0	10000		empty
137	ib pair bib	321	10000	b	complete
138	ib pair	383	25000	i	complete
139		0	25000		empty
140		0	25000		empty

- Export <IB PAIR ITEM> to Excel; check and review records by date, by location, by library.

Text Import Wizard - Step 1 of 3

The Text Wizard has determined that your data is Fixed Width.

If this is correct, choose Next, or choose the data type that best describes your data.

Original data type

Choose the file type that best describes your data:

- ⦿ Delimited   - Characters such as commas or tabs separate each field.
- ◯ Fixed width - Fields are aligned in columns with spaces between each field.

Start import at row: 1   File origin: 437 : OEM United States

Preview of file C:\Users\susanadmin\Documents\ibpair.txt.

```
1 "RECORD #(BIBLIO)"@"LOCATION"@"BCODE3"@"BIB UTIL #"@"CREATED(BIBLIO)"@"049|a"@"REC
2 "b10017483"@"u1    "@"p"@"bk02966942          "@"09-09-2014"@""@@@@"799.1 Morrow"@"
3 "b10049332"@"a     "@"p"@"ocm39709768 "@"09-09-2014"@""@@@@"J 1.8/2:D 63/3/SPAN."@"
4 "b10086894"@"a     "@"p"@"ocm39904223 "@"09-09-2014"@""@@@@"J 1.2:C 83/7"@"i1010637
5 "b10135042"@"u1    "@"p"@"   95010017 "@"09-09-2014"@""@@@@"796.8153 Moeller"@"i101
6 "b10135157"@"u1    "@"p"@"   95053692 "@"09-09-2014"@""@@@@"796.815 Lawler"@"i10166
```

Cancel   < Back   Next >   Finish

Text Import Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

- ☑ Tab
- ☐ Semicolon   ☐ Treat consecutive delimiters as one
- ☐ Comma   Text qualifier: "
- ☐ Space
- ☑ Other: @

Data preview

RECORD #(BIBLIO)	LOCATION	BCODE3	BIB UTIL #	CREATED(BIBLIO)	049|a	RECORD #
b10017483	u1	p	bk02966942	09-09-2014		
b10049332	a	p	ocm39709768	09-09-2014		
b10086894	a	p	ocm39904223	09-09-2014		
b10135042	u1	p	95010017	09-09-2014		
b10135157	u1	p	95053692	09-09-2014		

Cancel   < Back   Next >   Finish

ibpair.txt - Microsoft Excel

File   Home   Insert   Page Layout   Formulas   Data   Review   View   Developer

F12 | 29.2:St 2/7

	B	C	D	E	F	G	H	I	J	K	L	M	N
336	u1	p	bk02966942	9/9/2014	799.1 Morrow	i10021139	u1n	p	The Woman Angler.				
337	u1	p	95010017	9/9/2014	796.8153 Moeller	i10166294	u1n	p	Karate-do foundations / Mark R. Moeller.				
338	u1	p	95053692	9/9/2014	796.815 Lawler	i10166427	u1n	p	The martial arts encyclopedia / Jennifer Lawler.				
339	u1	p	81050105	9/9/2014	796.815 Hayes	i1016666x	u1n	p	The ninja and their secret fighting art / Stephen K. Hayes.				
340	u1	p	96022756	9/9/2014	796.939 Sullivan	i10167298	u1n	p	Snowboarding : a complete guide for beginners / George				
341	u1	p	pbb96275874	9/9/2014	796.939 Fabbro	i10167304	u1n	p	Snowboarding : the ultimate freeride / Mike Fabbro illus				
342	u1	p	CCE98901799	9/9/2014	796.83 Bunce	i10494972	u1n	p	Boxing greats : an illustrated history of the legends of the				
343	u1	p	CCE98800777	9/9/2014	796.939 Daniells	i10513231	u1n	p	Let it rip : the ultimate guide to snowboarding / [by] Greg				
344	u1	p	98006392	9/9/2014	799.2 Mettler	i10551591	u1n	p	Wild turkeys : hunting and watching / by John J. Mettler,				
345	u1	p	CCE98141195	9/9/2014	798.2 Britton	i10557520	u1n	p	The horse rider's problem solver : provides practical solut				
346	u1	p	CCE97201911	9/9/2014	797.1224 Kuhne	i10557635	u1n	p	Inflatable kayaking : the complete guide / by Cecil Kuhne.				
347	u1	p	CCE98121142	9/9/2014	796.815 Holme	i10557738	u1n	p	Judo rules / [by] Peter Holme [photos. by Bob Willingha				
348	u1	p	CCE97130362	9/9/2014	797.33 O'Shea	i10557817	u1n	p	Learn to windsurf / [by] Farrel O'Shea rev. by Bill Dawes				
349	u1	p	CCE98901362	9/9/2014	303.6 Media	i10557994	u1n	p	Media violence : opposing viewpoints / William Dudley, b				
350	u1	p	CCE97204188	9/9/2014	798.2 Britton	i10558287	u1n	p	A photographic guide to buying & selling horses : all the in				
351	u1	p	CCE97402054	9/9/2014	798.2 Mortimer	i10558378	u1n	p	The riding instructor's handbook / [by] Monty Mortimer				
352	u1	p	ocn123101701	9/9/2014	305.23 Tanenbaum	i10580682	u1n	p	Slut! : growing up female with a bad reputation / Leora T				
353	u1	p	1675611	9/10/2014	796.815 Vinh-Hoi	i10812039	u1n	p	The martial arts almanac / by Ngo Vinh-Hoi illustrated b				
354	u1	p	CCC89440305	9/10/2014	940.54 Stein	i10911509	u1n	p	Battle of Okinawa / by R. Conrad Stein.				
355	u1	p	77364289 //r85	9/10/2014	940.54 Hitler's	i10929514	u1n	p	Hitler's wartime picture magazine Signal / edited by S. L.				
356	u1	p	CCC89440447	9/10/2014	940.54 Stein	i10930991	u1n	p	Invasion of Russia / by R. Conrad Stein.				
357	u1	p	CCE97202532	9/10/2014	796.912 Milton	i1094543x	u1n	p	Super skaters : world figure skating stars / [by] Steve Milt				
358	u1	p	93032164 /AC	9/10/2014	797.33 Hays	i11035985	u1n	p	Surfing / by Scott Hays.				
359	u1	p		9/10/2014	305.3 Hanan	i11216645	u1n	p	Coping with changing roles for young men and women /				
360	u1	p		9/10/2014	303.3 Bowman-Kruhn	i11629708	u1n	p	Coping with discrimination and prejudice / Mary Bowmar				
361	u1	p	99030143	9/10/2014	303.6 Violent	i11663315	u1n	p	Violent children / Bryan J. Grapes, book editor.				
362	u1	p	ocm43275965	9/10/2014	798.2 Davis	i11766256	u1n	p	The young equestrian / Caroline Davis.				
363	u1	p	MLM0000232571	9/10/2014	796.52 Child	i11771756	u1n	p	Climbing : the complete reference to rock, ice and indoo				
364	u1	p	97030031	9/10/2014	796.939 Hart	i11772207	u1n	p	The snowboard book : a guide for all boarders / Lowell H				
365	u1	p	99043565	9/10/2014	305.235 Kowalski	i11870618	u1n	p	Teen rights : at home, at school, online / Kathiann M. Kov				
366	u1	p	CCE01200101	9/10/2014	798.2 New	i11990491	u1n	p	The new rider's companion / edited by Emma Callery ph				

ibpair   Ready   100%

- Notify staff of anomalies or incomplete records.

E24   9/9/2014

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	RECORD #(BIB	LOCATION	BCODE3	BIB UTIL #	REATED(BIB	RECORD #(H	RECORD #	RECORD #	CALL #(Item)	RECORD #	LOCATION	ICODE2	TITLE
2	b10017483	u1	p	bk02966942	9/9/2014	c1234760x			799.1 Morrow	i10021139	u1n	p	The Woman
3	b10049332	a	p	ocm39709768	9/9/2014		o1129473		J 1.8/2:D 63/3/SPAN.	i10060145	afd	p	La ley para p
4	b10086894	a	p	ocm39904223	9/9/2014				J 1.2:C 83/7	i10106376	afd	p	Looking at a
5	b10135042	u1	p	95010017	9/9/2014				796.8153 Moeller	i10166294	u1n	p	Karate-do fo
6	b10135157	u1	p	95053692	9/9/2014				796.815 Lawler	i10166427	u1n	p	The martial a
7	b10135303	u1	p	81050105	9/9/2014				796.815 Hayes	i1016666x	u1n	p	The ninja and
8	b10135777	u1	p	96022756	9/9/2014				796.939 Sullivan	i10167298	u1n	p	Snowboardin
9	b10135789	u1	p	pbb96275874	9/9/2014				796.939 Fabbro	i10167304	u1n	p	Snowboardin
10	b10151217	a	p	ocm40119905	9/9/2014				J 26.30:SU 7	i10185100	afd	p	1996 nationa
11	b10215724	a	p	ocm39277962	9/9/2014				J 29.2:C 26/2/998	i10262325	afd	p	Comparing ca
12	b10268522	a	p	ocm40462362	9/9/2014				J 32.10:G 15/3	i10317697	afd	p	Gang membe
13	b10346788	a	p	ocm35817699	9/9/2014				I 53.57:AL 1B	i1040644x	afdcd	p	General Land
14	b10347148	a	p	ocm39915976	9/9/2014				J 1.2:C 83/8	i10406979	afd	p	Juvenile and
15	b10380772	a	p	ocm40899432	9/9/2014				J 28.24/3:P 75/8	i10448275	afd	p	Systematic o
16	b10380930	a	p	ocm40907284	9/9/2014				J 28.24:F 86	i10448433	afd	p	Fraud contro
17	b10416183	s	p	KSUC0601264	9/9/2014				DVD 130	DVD 129	i10492008	i1049201x sdv	sd
18	b10418490	u1	p	CCE98901799	9/9/2014				796.83 Bunce	i10494972	u1n	p	Boxing great
19	b10418660	a	p	ocm36728417	9/9/2014				I 19.121:19/997	i10495150	afdcd	p	Geology and
20	b10433417	u1	p	CCE98800777	9/9/2014				796.939 Daniells	i10513231	u1n	p	Let it rip : the
21	b1045147x	a	p	ocm41178810	9/9/2014				J 29.2:AM 3	i10536814	afd	p	American Ind

- Export <IB Pair ITEM-BIB> to Excel; check here against serial copy records (C-records) and resolve serial holdings; other files as well.

ib-pair-bib.txt - Microsoft Excel

File | Home | Insert | Page Layout | Formulas | Data | Review | View | Developer

Get External Data: From Access | From Web | From Text | From Other Sources | Existing Connections
Connections: Refresh All | Connections | Properties | Edit Links
Sort & Filter: Sort | Filter | Clear | Reapply | Advanced
Data Tools: Text to Columns | Remove Duplicates | Data Validation | Consolidate | What-If Analysis

A8 : b19064858

	A	B	C	D	E	F	G	H	I	J	K	L
1	RECORD #(BIBL	LOCATION	BCODE3	BIB UTIL #	CREATED(I 049|a		RECORD #	RECORD #	RECORD #	CALL #(Ite	RECORD #	LOCATION
2	b19167374	a	p	ocm18724	########		c10109936			KD YA 110.	i22257391	akd
3	b18893259	a	p	ocm10319	########		c10116898			J 29.11/2-3	J 29.11/2-3	i20696966
4	b19137953	a	p	ocm58915	########		c10137580			Y 4.G 74/9	i22069495	afd
5	b18939995	a	p	ocm23993	########		c1013945x			I 27.1/4:	I 27.1/4:	I 27.1/4:
6	b19164828	a	p	ocm17471	########		c10184090			KD YA 110.	i22238578	akd
7	b19043995	a	p	ocm24310	########	KFPJ	c10207648			Y 4.ST 2/3-	i2104174x	afd
8	b19064858	a	p	ocm31178	########		c10208458			EP 1.2:L 11	EP 1.2:L 11	i21158848
9	b10046240	a	p	ocm39661	9/9/2014					EP 1.2:EN	i1005649x	afd
10	b1008759x	a	p	ocm39932	9/9/2014					Y 4.EC 7:T	i10107101	afd
11	b10155703	a	p	ocm04553	9/9/2014					Ju 13.10:7:	i1019034x	afd
12	b10220847	a	p	ocm40219	9/9/2014	KFPJ				Y 4.SM 1/2	i10267451	afd
13	b10223575	a	p	ocm40326	9/9/2014					HE 20.352(	i10270292	afd
14	b10225742	a	p	ocm40357	9/9/2014	KFPJ				Y 4.SM 1/2	i10272501	afd
15	b10265235	a	p	ocm40390	9/9/2014					HE 20.352(	i10314404	afd
16	b1026713x	a	p	ocm40418	9/9/2014					D 101.2:T	i10316309	afd

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b19179157 — Search — +

b19179157

File Edit View Go Tools Window Help

Browse — Save All

b19179157
Title   The Development and management of ambulatory care programs : an annotated bibliography / National Clearinghouse for Primary Care Information.
Publication Info.   [Rockville, Md.?] : U.S. Dept. of Health & Human Services, Public Health Service, Health Resources and Services Administration, Bureau of Health C
Locations   a

Summary			Record	Card	Holdings	Routing	Bib-Level Holds

Summary   c10234202   c10234202   c10234202   0   0

View a All

#	Record Number	DESCRIPTION
✓ 1	c10234202	Location:afd Identity: STATUS:NO CARD FREQUENCY: BOXES:
2	i22323375	Location:afd Barcode:35902005146028 Volume:1989
3	i22323387	Location:afd Barcode:35902005021452 Volume:1982

- Copy bib numbers from Excel <IB Pair ITEM-BIB> to flat text file for deletion list by bib number. Count # of titles, and date, and save away.

Excel window — ib-pair-by-bib.txt - Microsoft Excel. Cell A322 = b20779240

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	RECORD #(BIB	LOCATION	BCODE3	BIB UTIL #	REATED(BIBLIC	RECORD #(H	RECORD #	RECORD #	CALL #(Item)	RECORD #	LOCATION	ICODE2	TITLE
2	b10017483	u1	p	bk02966942	9/9/2014	c1234760x			799.1 Morrow	i10021139	u1n	p	The Woman
3	b10049332	a	p	ocm39709768	9/9/2014		o1129473		J 1.8/2:D 63/3/SPAN.	i10060145	afd	p	La ley para p
4	b10086894	a	p	ocm39904223	9/9/2014				J 1.2:C 83/7	i10106376	afd	p	Looking at a
5	b10135042	u1	p	95010017	9/9/2014				796.8153 Moeller	i10166294	u1n	p	Karate-do fo
6	b10135157	u1	p	95053692	9/9/2014				796.815 Lawler	i10166427	u1n	p	The martial a
7	b10135303	u1	p	81050105	9/9/2014				796.815 Hayes	i1016666x	u1n	p	The ninja and
8	b10135777	u1	p	96022756	9/9/2014				796.939 Sullivan	i10167298	u1n	p	Snowboardin
9	b10135789	u1	p	pbb96275874	9/9/2014				796.939 Fabbro	i10167304	u1n	p	Snowboardin
10	b10151217	a	p	ocm40119905	9/9/2014				J 26.30:SU 7	i10185100	afd	p	1996 nationa
11	b10215724	a	p	ocm39277962	9/9/2014				J 29.2:C 26/2/998	i10262325	afd	p	Comparing ca
12	b10268522	a	p	ocm40462362	9/9/2014				J 32.10:G 15/3	i10317697	afd	p	Gang membe
13	b10346788	a	p	ocm35817699	9/9/2014				I 53.57:AL 1B	i1040644x	afdcd	p	General Land
14	b10347148	a	p	ocm39915976	9/9/2014				J 1.2:C 83/8	i10406979	afd	p	Juvenile and
15	b10380772	a	p	ocm40899432	9/9/2014				J 28.24/3:P 75/8	i10448275	afd	p	Systematic o
16	b10380930	a	p	ocm40907284	9/9/2014				J 28.24:F 86	i10448433	afd	p	Fraud contro
17	b10416183	s	p	KSUC0601264	9/9/2014				DVD 130	DVD 129	i10492008	i1049201x sdv	sd
18	b10418490	u1	p	CCE98901799	9/9/2014				796.83 Bunce	i10494972	u1n	p	Boxing great:
19	b10418660	a	p	ocm36728417	9/9/2014				I 19.121:19/997	i10495150	afdcd	p	Geology and
20	b10433417	u1	p	CCE98800777	9/9/2014				796.939 Daniells	i10513231	u1n	p	Let it rip : the
21	b1045147x	a	p	ocm41178810	9/9/2014				J 29.2:AM 3	i10536814	afd	p	American Ind
22	b1045679x	u3	p	ocn12453869:	9/9/2014				599.78 OST	i10543442	u3n	p	A baby panda
23	b10462120	u1	p	98006392	9/9/2014				799.2 Mettler	i10551591	u1n	p	Wild turkeys
24	b10466228	a	p	ocm03451438	9/9/2014				I 29.2:St 2/7	i10556163	afd	p	Statues, mon
25	b10467531	u1	p	CCE98141195	9/9/2014				798.2 Britton	i10557520	u1n	p	The horse rid
26	b10467646	u1	p	CCE97201911	9/9/2014				797.1224 Kuhne	i10557635	u1n	p	Inflatable kay
27	b10467737	u1	p	CCE98121142	9/9/2014				796.815 Holme	i10557738	u1n	p	Judo rules / [
28	b10467804	u1	p	CCE97130362	9/9/2014				797.33 O'Shea	i10557817	u1n	p	Learn to wind
29	b10467981	u1	p	CCE98901362	9/9/2014				303.6 Media	i10557994	u1n	p	Media violen
30	b10468262	u1	p	CCE97204188	9/9/2014				798.2 Britton	i10558287	u1n	p	A photograph
31	b10468353	u1	p	CCE97402054	9/9/2014				798.2 Mortimer	i10558378	u1n	p	The riding ins

Count: 321

Notepad window — Untitled - Notepad

```
b1792411x
b17936202
b17972309
b1797267x
b17985791
b1801169x
b18026461
b18175673
b18237976
b18272599
b18312184
b18315902
b18378298
b18378316
b18720481
b18907829
b18908056
b18934821
b18950012
b18969744
b19051992
b19058093
b19066600
b19066685
b19070597
b19071401
b19147569
b19158038
b19162510
b19179960
b19191157
b20214893
b20662567
b20762082
b20762914
b20763116
b20763153
b20763244
b20763396
b20763840
b20777048
b20777115
b20779240
```

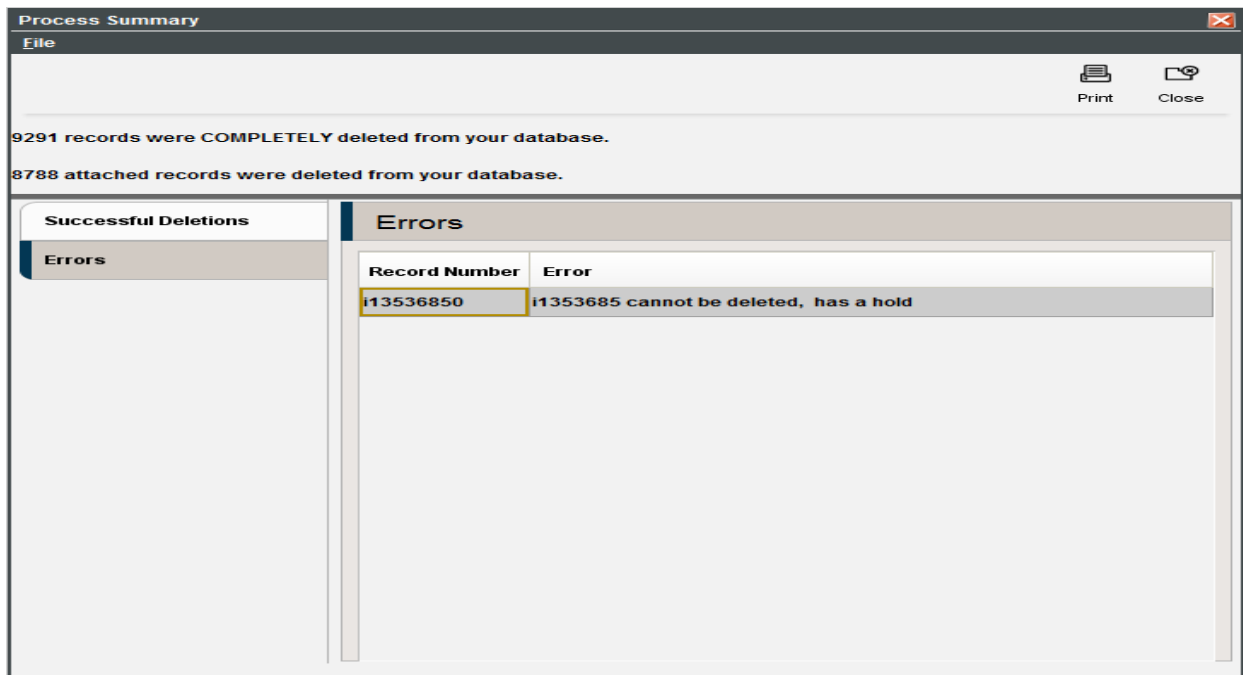- Using Delete-Records function, discard <IB-PAIR ITEM>, discarding both item and associated bib.

This is always the scary bit: point of no return. Always make sure you have backups of your 001 records in a spreadsheet should you have to reconstruct what you just deleted.

- Make note of exceptions at the end of the discard for any that failed, to hand remove the bib number from your flat text file of bib numbers. Identify failures and route/resolve appropriately.
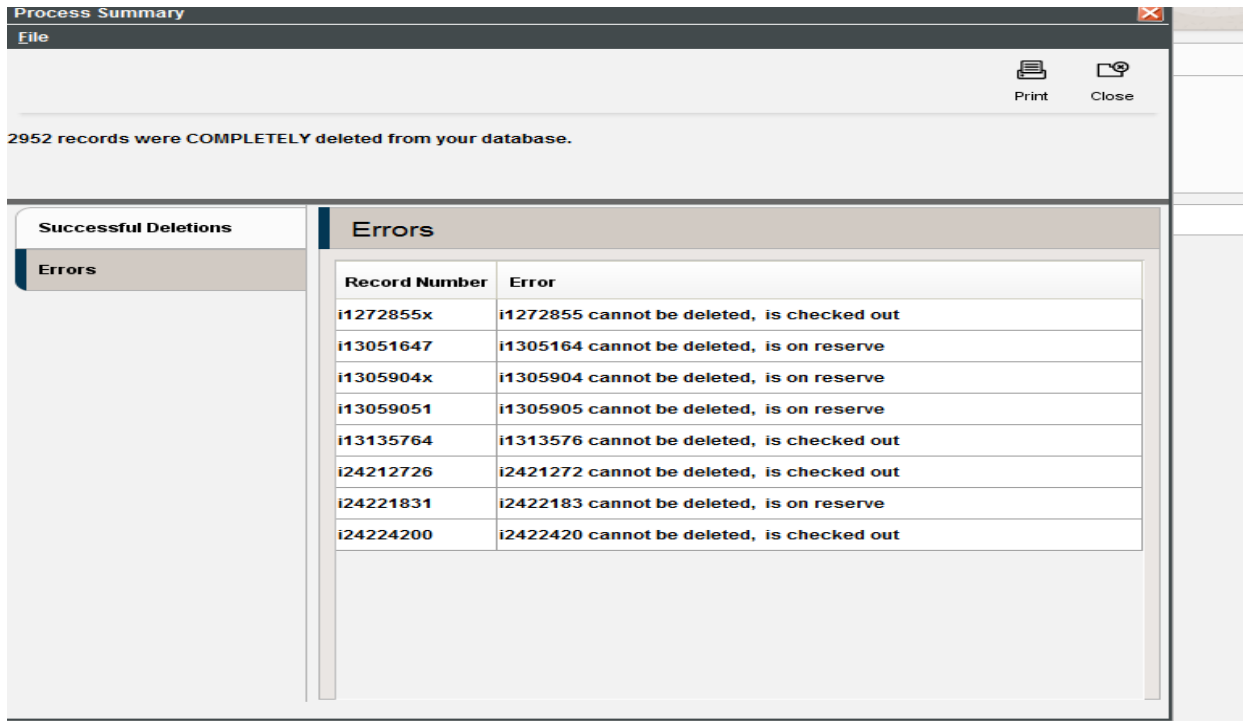
Process Summary

File

Print   Close

383 records were COMPLETELY deleted from your database.

321 attached records were deleted from your database.

Successful Deletions	Errors	
Errors	Record Number	Error

A successful Discard! ^^^^

Process Summary

File

Print   Close

9291 records were COMPLETELY deleted from your database.

8788 attached records were deleted from your database.

Successful Deletions	Errors	
Errors	Record Number	Error
	i13536850	i1353685 cannot be deleted, has a hold

An example of a not-so-successful Discard ^^^

 Or

Process Summary

File

Print   Close

2952 records were COMPLETELY deleted from your database.

	Errors	
Successful Deletions		
Errors	**Record Number**	**Error**
	i1272855x	i1272855 cannot be deleted, is checked out
	i13051647	i1305164 cannot be deleted, is on reserve
	i1305904x	i1305904 cannot be deleted, is on reserve
	i13059051	i1305905 cannot be deleted, is on reserve
	i13135764	i1313576 cannot be deleted, is checked out
	i24212726	i2421272 cannot be deleted, is checked out
	i24221831	i2422183 cannot be deleted, is on reserve
	i24224200	i2422420 cannot be deleted, is checked out

Whoops! Probably should have reviewed that list a little more closely!

IDENTIFY: items ONLY where bibcode3 = "" and icode2 = "p"

- Save these as item field discards in create lists as <ITEMS-ONLY>
- Run a parallel review file of these as bibs <ITEMS-ONLY-BIBS>.

Boolean Search

Review File Name: items-only-bib

Store Record Type: Bibliographic b

Review ▼   Review file: 138. items-only (211) (Item)

Term	Operator		Type	Field	Condition	Value A	Value B	
1								

Group
Ungroup
Insert Line
Append Line
Delete
Clear All

Search   Use Existing Search   Retrieve Saved Query   Save   Save As   Close
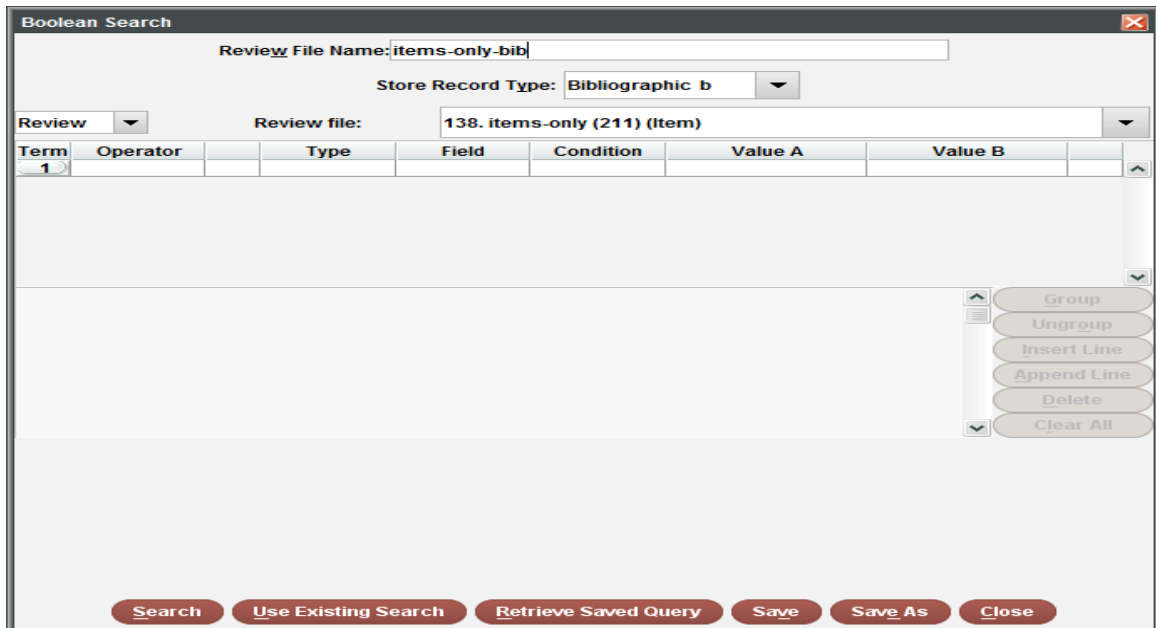
- These discards will differ from the IB Pairs, as the goal here is to discard one (or several) suppressed items, while leaving other active ones on an active bib. Therefore, the discovery tool will see these as bibs which have been changed/updated rather than deletes (i.e., one less 949 or 952 tag with item information in it). These are then classified/listed as "updates/changes" for your export out to the discovery tool.

- Output <ITEMS-ONLY> to Excel
- Check and review records by date, by location, by library; resolve as appropriate
- Run a parallel list by BIB, <ITEMS-ONLY-BIBS>, but do not output until after the items are discarded.
- Using Delete-Records function, discard <ITEMS-ONLY>, discarding ONLY the ITEM.

File Edit View Go Tools Reports Admin Window Help

sierra

b10086092
Title   The Darjeeling Limited [videorecording] / Fox Searchlight Pictures & Collage present ; an Americ
             Anderson ... [et al.] ; made in association with Dune Entertainment.
Publication Info.   Beverly Hills, Calif. : 20th Century Fox Home Entertainment, [2008]

Review ▼   Review file: 138. i

◉ Delete the listed Item record ONLY
○ Delete the listed Item record AND attached Bibliographic record (if no other records attached)

Delete Records

	Record	
181	i23959514	Sports illustrated.
182	i23971885	Sports illustrated.
183	i23981325	Sports illustrated.
184	i23990685	Sports illustrated.
185	i23998489	Sports illustrated.
186	i24005174	Sports illustrated.
187	i24022822	Sports illustrated.
188	i24031227	Sports illustrated.
189	i24040952	Sports illustrated.
190	i24052693	Sports illustrated.
191	i24059882	Sports illustrated.
192	i2406550x	Sports illustrated.
193	i24145403	Sports illustrated.
194	i24156577	Sports illustrated.
195	i24187859	Sports illustrated.
196	i24194785	Sports illustrated.
197	i24219095	Design world.
198	i24243218	Design world.
199	i24341459	Design world.
200	i24433871	Design world.

- After discard, output the <ITEMS-ONLY-BIBS> in Data-Exchange as a change/modification MARC file to forward to the discovery tool.
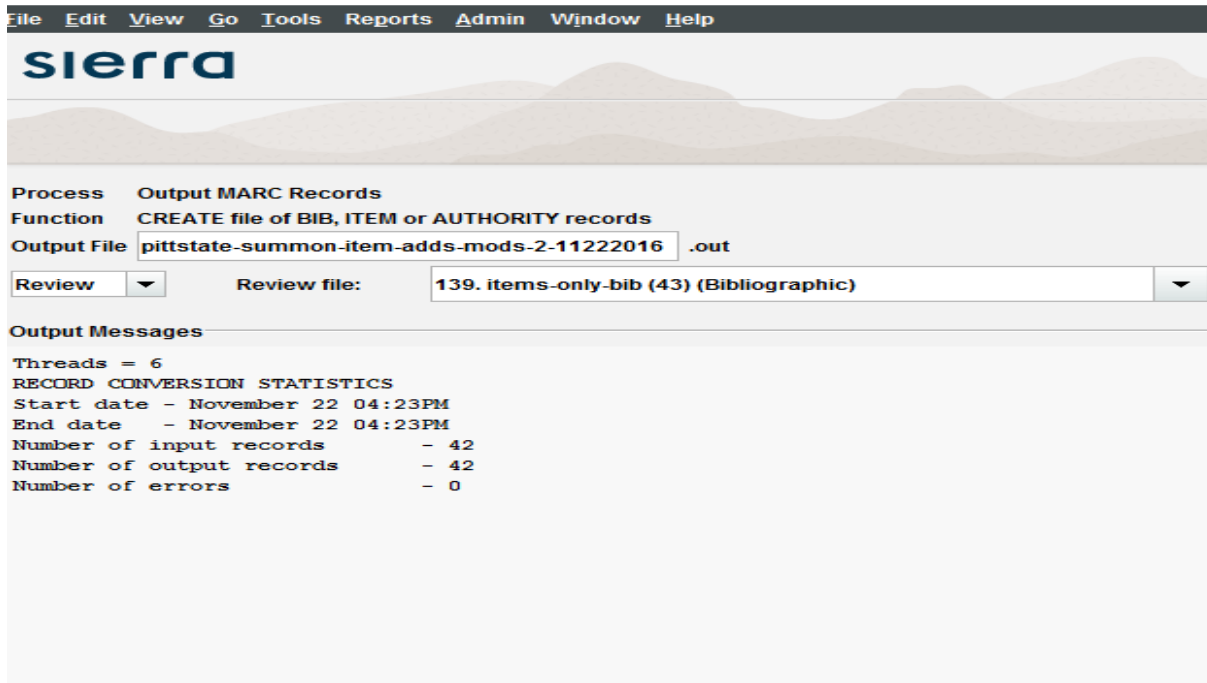
IDENTIFY: Bibs with NO ITEMS, ORDERS, RESERVE, SERIAL COPY RECORDS

- Create review file for <BIBS ONLY> with only bibcode3 = "p"
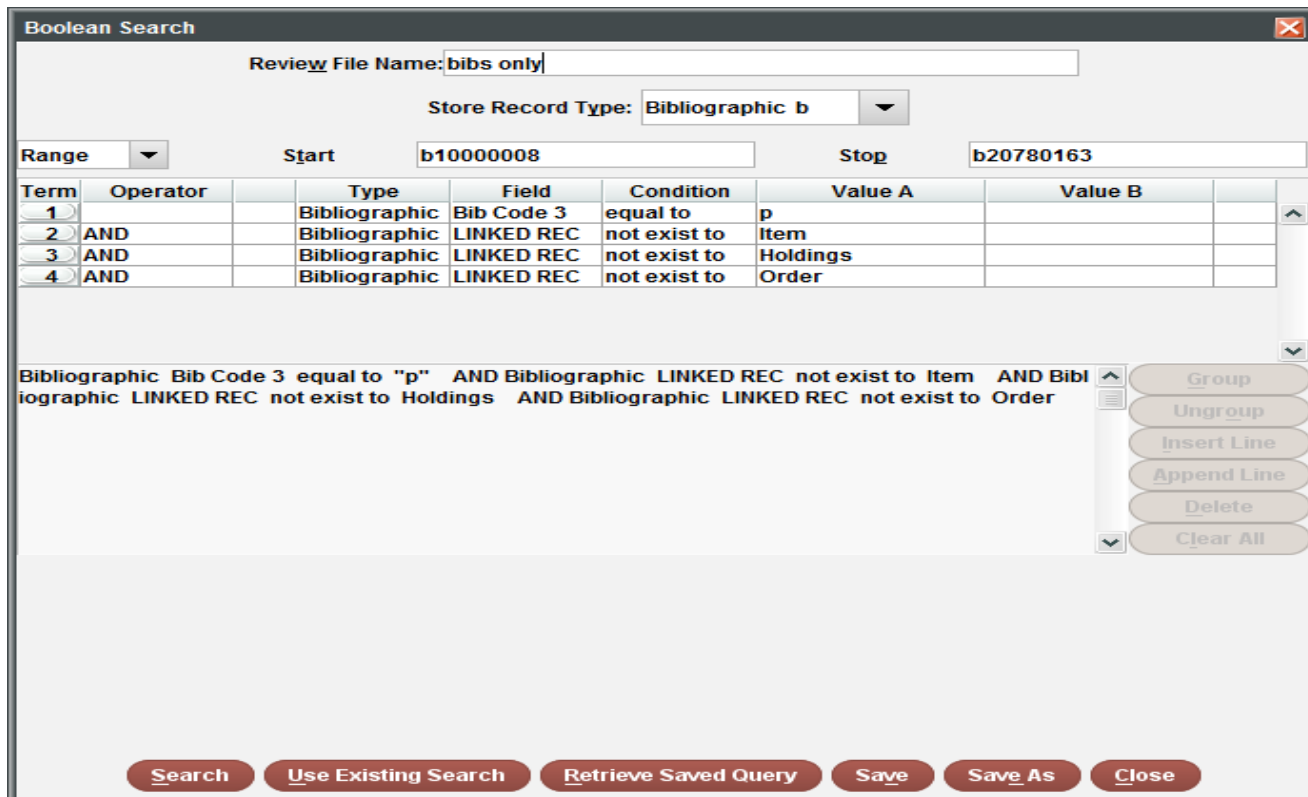
- Review for "empty bibs" – no linked records, newly added
- Output to Excel; check and review records by date, by location, by library
- Notify staff of anomalies or incomplete processes
- Copy bib numbers from Excel and append to flat text file saved from <IB Pair ITEM-BIB>

Success! ^^^^^

- Delete <BIBS ONLY>

File Edit View Go Tools Reports Admin Window Help

sierra

b10014949

Author	**Thompson, Lauren, 1962-**
Title	**Wee Little Lamb / by Lauren Thompson ; illustrated by John Butler.**
Publication Info.	**New York : Simon & Schuster , c2009.**
Standard No.	**9781442427204**

Review ▼   Review file: 136. bibs only (26) (Bibl

○ Delete the listed Bibliographic record ONLY (if no other records attached)
○ Delete the listed Bibliographic record AND all attached records

Delete Records

	Record	
1	b10014949	Wee Little Lamb / by Lauren Thompson ; illustrated by John Butler.
2	b10019650	Rage in the streets : mob violence in America / by Jules Archer ; illustra
3	b10030293	Amazing ants / Sue Whiting, Stuart Martin.
4	b10940753	Mother loves her little one / [Carol Ottolenghi].
5	b11055753	My life [videorecording] Columbia Pictures in associatin with Capella F
6	b11200340	Effect of fire-retardant treatment and redrying on the mechanical prop
7	b1264609x	A day in the life of a coach / Mary Bowman-Kruhm and Claudine G. Wirt
8	b12763172	Physician-assisted suicide and euthanasia
9	b13512146	Star Wars ABC.
10	b14694244	United States census of housing, 1950. Block statistics. Topeka, Kansa
11	b1469458x	United States census of agriculture, 1950. Volume 2, General report : fa
12	b15253338	I dream a world : portraits of black women who changed America / pho
13	b15312471	Man and his symbols / [by] Carl G. Jung [and others]
14	b15334727	The Soviet juggernaut / by Earl F. Ziemke and the editors of Time-Life E
15	b1840232x	The Lucy show [videorecording].
16	b19034246	Job choices.
17	b19176995	International Studies Abroad : summer catalog.
18	b19177008	International Studies Abroad : year-semester/trimester-month catalog
19	b20055122	Handy Manny / illustrated by Gil DiCicco ; written by Julia Lobo.
20	b20380884	Puppies/ [illustrated by Mike Byrne].
21	b20551514	Busy baby / [written by Susan Amerikaner ; photography by Anthony N
22	b20555489	Coconino National Forest 2016 firewood program = Bosque Nacional C
23	b20581579	Cross the line / James Patterson.
24	b2058166x	Mistletoe secret / Richard Paul Evans.
25	b20581774	When All the Girls Have Gone / Jayne Ann Krentz.
26	b2074805x	[Life Under the Sea]

Important at this time to make sure that all bibs from <BIBS ONLY> and <IB PAIR ITEM BIB> are now recorded to a flat text file and coded as <DELETES-MMDDYY>. Summon, in particular, does not need the whole MARC record to discard (although it can use the whole MARC with correct coding, depending on your local situation).

IDENTIFY: Items and Bibs that have been added and/or changed/modified

- Using the last "harvest date", create a list of added/modified items.

Boolean Search

Review File Name: summon-item-adds-mods

Store Record Type: Item i

Range | Start | i10000008 | Stop | i*

Term	Operator	Type	Field	Condition	Value A	Value B	
1		Item	Created Date	greater tha...	11-18-2016	- -	
2	OR	Item	Updated Date	greater tha...	11-18-2016	- -	

Item Created Date greater than or equal to "11-18-2016" OR Item Updated Date greater than or equal to "11-01-2016"

Group
Ungroup
Insert Line
Append Line
Delete
Clear All

Search | Use Existing Search | Retrieve Saved Query | Save | Save As | Close

134		0	10000		emp
135		0	10000		emp
136	summon-items-adds-mods-by-bib	8282	10000	b	com
137	summon-item-adds-mods	9555	10000	i	com
138	summon-bib-adds-mods	1917	25000	b	com
139		0	25000		emp
140		0	25000		emp
141		0	25000		emp

- Create a parallel list of bibs from the added/modified items.
- Output through Data Exchange the bibs for <ITEM-ADDS-MODS-1>

File   Edit   View   Go   Tools   Reports   Admin   Window   Help

sierra

Process   Output MARC Records
Function   CREATE file of BIB, ITEM or AUTHORITY records
Output File pittstate-summon-item-adds-mods-1-11222016   .out

Review ▼   Review file: 136. summon-items-adds-mods-by-bib (8282) (Bibliographic)   ▼

Output Messages

Threads = 6
RECORD CONVERSION STATISTICS
Start date - November 22 04:34PM
End date   - November 22 04:35PM
Number of input records   - 8282
Number of output records   - 8282
Number of errors   - 2

- Using the last "harvest date", create a list of added/modified bibs.
- Output through Data Exchange the bibs for <BIB-ADDS-MODS>

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File   Edit   View   Go   Tools   Reports   Admin   Window   Help

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Process   Output MARC Records
Function   CREATE file of BIB, ITEM or AUTHORITY records
Output File pittstate-bib-adds-mods-11222016   .out

Review ▼   Review file: 138. summon-bib-adds-mods (1917) (Bibliographic)   ▼
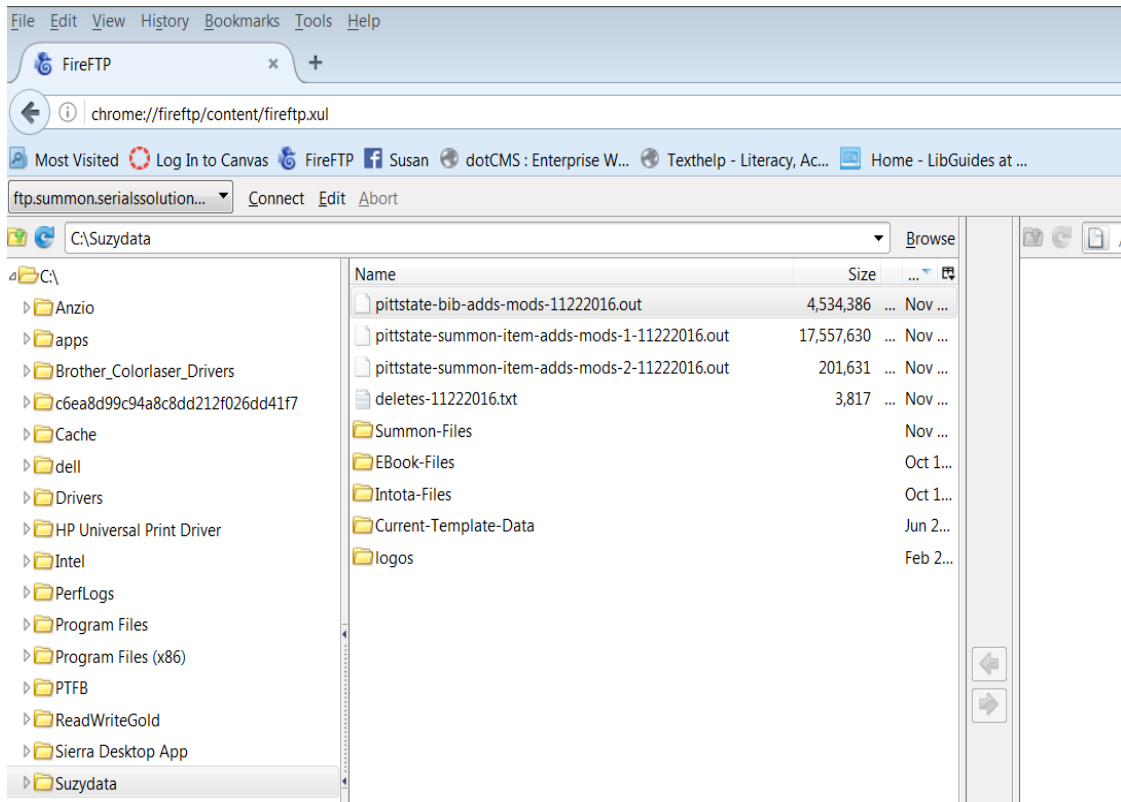
Output Messages

Threads = 6
RECORD CONVERSION STATISTICS
Start date - November 22 04:36PM
End date   - November 22 04:37PM
Number of input records   - 1917
Number of output records   - 1917
Number of errors   - 2

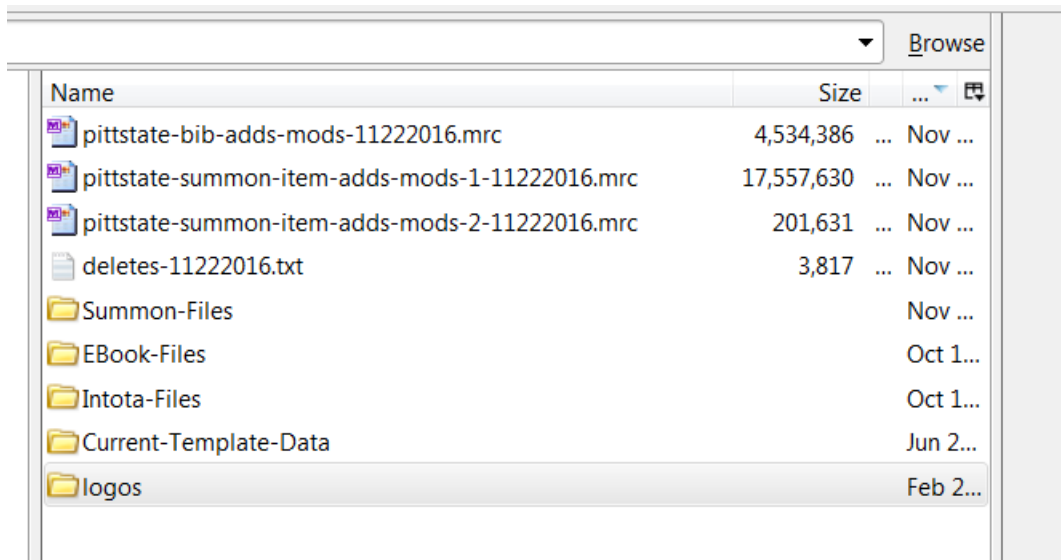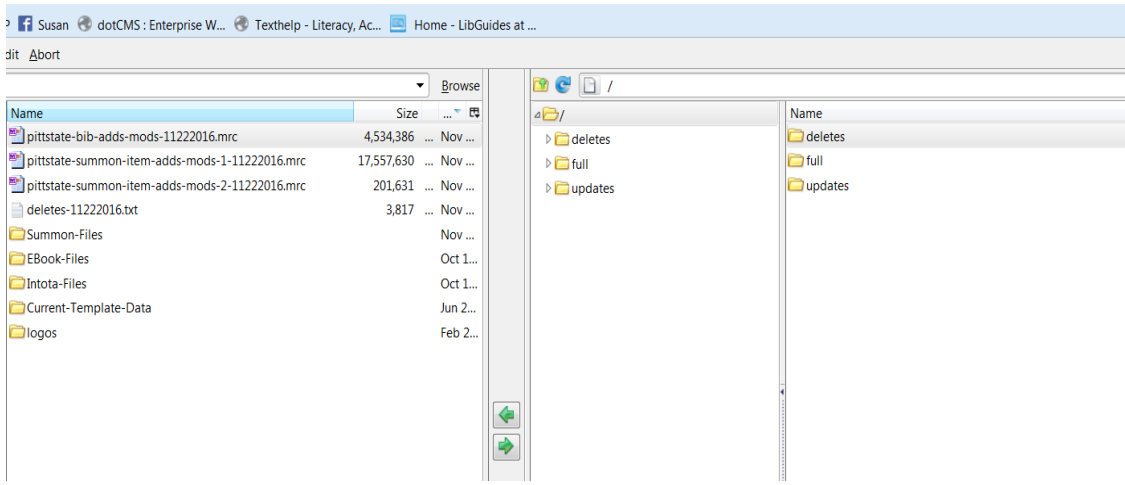- Output the <ITEMS-ONLY-BIBS> in Data-Exchange from your item discards (above).

- These three files, <ITEMS-ONLY-BIBS>, <ITEM-DDS-MODS-1> and <BIB-ADDS-MODS> can then be ftp'd up to Summon as "updates".

- Change the extensions on these three from .out to .mrc and load to the "Updates" folder.

- Load the DELETES.txt file to Summon in the "Deletes" folder.

- Clear Data-Exchange Function files after the next harvest.
- Keep Spreadsheet files for at least 1 month as backup 001.
- Delete remaining Saved List files after successful upload to Summon folders.

EVALUTE: Mapping for Content Sierra > Summon

	A	B
1	**Summon Content Type Mapping**	
2	Architectural Drawing	
3	Archival Material	Leader(06) = p
4	Atlas	
5	Audio Recording	007(00) = s **OR** Leader(06)=i **OR** Leader(06)=j
6	Audio Tape	
7	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
8	Book Chapter	
9	Book Review	
10	Compact Disc	
11	Computer File	008(26) = a, b, c, d, e, f, g, m **OR** z
12	Computer File	Leader(06) = m
13	Conference Proceeding	008(29) = 1
14	**Content Type**	**Default MARC Field Mapping**
15	Course Reading	
16	Database	
17	DVD	
18	**eBook**	
19	eJournal	
20	Film	
21	Globe	
22	Government Document	008(28) = a, c, f, i, l, m, o, s, **OR** z **AND** Leader(06) = a
23	Image	Leader(06) = k
24	Interactive Media	
25	Journal	Leader(06-07) = as
26	Journal Article	
27	Kit	007(00) = o OR Leader(06) = o
28	Manuscript	Leader/06 = t
29	Map	007(00) = a **OR** Leader(06) = e **OR** Leader(06) = f
30	Microfilm/Microform (Please Specify)	007(00) = h
31	Microfilm/Microform (Please Specify)	008(23) = a
32	Microfilm/Microform (Please Specify)	008(23) = b
33	Microfilm/Microform (Please Specify)	008(23) = c
34	Music Manuscript	
35	Music Recording	
36	Music Score	007(00) = q **OR** Leader(06) = c **OR** Leader(06) = d

37	Newspaper	008(21) = n
38	Newspaper Article	**AND** Leader(07) = s
39	Patent	
40	Photograph	
41	Poster	
42	Realia	Leader(06) = r
43	Reference	
44	Report	
45	Sheet Music	
46	Special Collection	
47	Spoken Word Recording	
48	Standard	
49	Streaming Audio	
50	Streaming Video	
51	Student Thesis	
52	Thesis/Dissertation	008(24-27) = m **AND** Leader(06-07) = am
53	Thesis/Dissertation	502 field (Dissertation Note) is present
54	Video Recording	007(00) = m **OR** 007(00) = v **OR** Leader(06) = g
55	Web Resource	007(00) = c **OR** 008(23) = s **OR** 008(26) = i **OR** 008(26) = j **OR** Leader(06-07) = ai

949 : Real Time Availability > Library Location Facet comes from 949$j

38	URI	856$u
39	Volume	490$v, 440$v, 830$v
40		
41	Key	Library Location Facets - Name - derived from 949 $j (outbound)
42	1	Axe Library
43	3	CRC Library
44	4	Eureka Public
45	5	FSCC Library
46	2	KTC Library
47	12	Lakeside Library
48	11	Meadowlark Library
49	13	Nettels Library
50	10	PCMS Library
51	9	PHS Library
52	7	Parsons Public
53	6	Pittsburg Public
54	8	Sedan Public
55	14	Westside Library
56		
57		
58		
59		

This is just an example of the content mapping (facets) that is available through Summon. Remember that your facet mapping will be driven by the MARC record encoding, **not the MatTypes in Sierra.** Additional mapping options for specific fields beyond fixed field data is available on request from Susan Johns-Smith, sjohnssmith@pittstate.edu