

Workflows How-To Use SmartPort

If you have additional questions, please contact:

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How to Use SmartPort for obtaining bibliographic records:

1. Search for the title in Call Number and Item Maintenance using at least 3 types of searches (e.g. ISBN, Title Browse, Title Keyword). If the title cannot be found on the local system, Smartport may be used to search other databases for a matching MARC record.
2. On the Cataloging Toolbar, click the SmartPort Wizard (lightning bolt)
3. Select databases to be searched
 - o Check CATALOG (this searches our own catalog)
 - o Check MELCAT (this searches MelCat, the statewide database)
 - o Check LC (this searches the Library of Congress catalog)
 - o Check OCLC- (if available, this searches OCLC's database)
4. Click Connect
5. Search for your item
 - o For ISBN:
 - Enter ISBN in the "Search For" box
 - Index = ISBN
 - Click Search
 - o For Title:
 - Enter title KEYWORDS in the "Search For" box
 - Index = Title
 - Click Search (Browse does not work with Library of Congress)
 - o For items with no control number
 - Click the "Change search pane view" helper to search by title and author/performer or other fields using a boolean search.
6. Examine search results and select appropriate record
 - o If exact match is found in "Catalog":
 - **Do not continue** with this item!
 - Go back to Call Number and Item Maintenance to find the item on our system.
 - o If search returns a list of results, only a short list will be shown:
 - To see additional titles, highlight a title in the list.
 - Click the right arrow at the top of the window to move through the list.
7. Select item (if no match is made in our Catalog)
 - o **Click Display to see the full record.**
 - RDA records containing 336, 337 and 338 tags are preferred.
 - o To view as a MARC record, uncheck Formatted at the top (optional)
 - o Verify record matches item in-hand. Check the following:
 - 020/ISBN
 - 100/Author
 - 245/Title
 - 260 or 264/Publication
 - 300/Description

- If not the correct record, click close and repeat this step.
8. If a match is found, click Capture.
 9. The capture properties should be preset and do should not need to be changed. Please contact SLC/UPRLC staff if they do not appear as described below.
 - Check Match and Load
 - Title control number source = iols
 - Call sources = DEWEY,082,a,N (Special and Academic will have LC instead of DEWEY)
 - Library = Your library name
 10. If a box pops up saying "**Matching record found on...**"
 - Write down the matching title control# (we do not want to replace existing records on the local system).
 - Click OK
 - **Click CLOSE!!!!** (NOT Save)
 - **Click NO!!!** (when it asks if you want to save the record)
 - Search for the record in Call Number and Item Maintenance using the Title Control# index.
 - If this record is incomplete or not a good match, please contact SLC/UPRLC staff for assistance.
 11. If a box pops up saying "**Error: The Call Number...already exists...**"
 - Type **AUTO** (MUST BE IN ALL CAPS!!!!) into the box
 - Click Ok (this will generate a temporary XX... call number that can then be replaced after the item information is added).
 12. If necessary add pagination and RDA tags. Also delete bisac and fast subject headings if they are present.
 - In the 300 field, add page numbers if necessary.
 - If necessary, add [RDA 3XX tags](#).
 - Remove fast and bisac subject headings from the record.
 - 650 7 |2fast|0(OcoLC)
 - 650 7 |2bisacsh
 - Click Save
 - Click Close
 13. Add your Item information (Holdings)

NOTE: If you forget to add your Item information your item will not be added to the system automatically, and it won't be able to circulate.

 - Click Call Number and Item Maintenance Wizard
 - Click OK to properties
 - Use a title keyword search for the item or click the Current title if it matches your item.
 - Select your Library and call number on the left-hand side
 - Click Add Item
 - Enter Item Information (see [How to Add an Item](#))
 - Click Save
 - Modify Call Number (see [How to Edit a Call Number](#))
 - Change Class Scheme to DEWEY
 - Click Save
 - Continue searching in SmartPort (if connection has timed out, close the search window and re-connect to the databases)