

SmartPort Properties

SmartPort allows dynamic capture and loading of MARC bibliographic and authority records from a Z39.50 server directly into the library's catalog. SmartPort properties should be set the first time the wizard is used.

1. **Click** on Cataloging Wizard Group.
2. **Right-Click** on SmartPort wizard, **select** Properties



Bibliographic Record Load Options

3. The **Replace current record** option will confirm that you want to overlay any bibliographic (or authority) record that is **displayed, selected, or in memory** in the staff client workstation.

NOTE: *Caution is recommended when using this option!*

4. **Match and load** - will use the match points to determine whether any record in the catalog matches the one that is being captured. If any does, you will be notified before it is displayed to be replaced. **This option is selected by default.**

5. **Match on title control number** - The record is considered a match only if the control number matches a title control number found in one of the Title Control Number Source fields.

6. **Match on Title Control Number OR Indexed MARC Tag** – The record is considered a match if the title control number matches one of the specified Title Control Number Source fields in the imported record, **or** if one of the standard matching numbers from the incoming record as listed in the Indexed MARC Tag Number field finds a match in an existing SirsiDynix Symphony database index.

7. **Match on Title Control Number AND Indexed MARC Tag** – The record is considered a match if the title control number matches one of the specified Title Control Number Source fields in the imported record, **and** if at least one of the standard matching numbers from the incoming record as listed in the Indexed MARC Tag Number field finds a match in an existing database index. **This**

option is selected by default.

8. **Title control number source (LOWERCASE)** – recommended matches are “**oisl**” (case-sensitive) – (OCLC number, ISBN number, SSN number, LOC number). Match will occur if OCLC number is present. If no OCLC number is present, load will continue looking for matching ISBN number; etc. If there is not a match, a **new record** will display to be accepted or modified. **These options are set by default.**

Title control number source:

List selected

- OCLC number (001)
- ISBN (020)
- ISSN (022)
- LCCN (010)

NOTE: *If, at the time of capturing the record, you wish to load it as a new record, insert “k” at the title control number source.*

9. **Indexed MARC tag number** – specifies which MARC tags will be used as match points.

Indexed MARC tag number:

List selected

- ISBN (020)
- LCCN (010)
- ISSN (022)

10. **Call sources (UPPERCASE)** specifies the source of call number information.
Enter **ATDEWEYLOC,949,,** (case sensitive)

Call sources:

NOTE: *This will create the “AUTO-generated” XX call number that is necessary to proceed.*

11. **Select** your Library code from the drop-down menu, if not displayed.
12. **Format** default is MARC.

13. **Remove subject headings** - Allows you to specify the subject headings that should be removed, based on the 6XX second indicator values. **These headings, rarely needed with K-12 items, are set by default to be removed.**

Remove subject headings

List selected

- National Library of Medicine Subject Headings (2)
- National Agricultural Library Subject Headings (3)
- National Library of Canada Subject Headings (5)
- Répertoire des vedette-matière (6)

14. **Set remaining** properties as displayed (default settings).

- **Verify options, when selected,** will open these property settings at the point of importing the record, allowing changes to be made if needed.
- **Strip junktags, when selected,** will remove unnecessary tags (INFOhio determined – can be customized) from the imported record before loading it.

Verify options: Yes No
Strip junktags: Yes No

15. **Click OK.**

Bibliographic records loaded via SmartPORT will be created as title and call number records. Use the Call Number and Item Maintenance wizard to edit XX call numbers, add copies.

Note: For more detailed information or specific questions, use HELP wizard