

Workflows How-To

Use SmartPort

If you have additional questions, please contact: support@superiorlandlibrary.org

ONLY USE SMARTPORT if you are UNABLE to find a record using Call Number and Item Maintenance.

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
 - Check CATALOG (this searches our own catalog)
 - Check MELCAT (this searches MelCat, the statewide database)
 - Check LC (this searches the Library of Congress catalog)
 - Check OCLC- (if available, this searches OCLC's database)
4. Click Connect
5. Search for your item
 - For ISBN:
 - ✦ Enter ISBN in the Search For box
 - ✦ Index = ISBN
 - ✦ Click Search
 - For UPC:
 - ✦ Enter UPC in the Search For box
 - ✦ Index = Number
 - ✦ Click Search
 - For Title:
 - ✦ Enter title KEYWORDS in the Search For box
 - ✦ Index = Title
 - ✦ Click Search (Browse does not work with LoC)
 - 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
 - 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.
 - 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)
 - **Click Display to see the full record.**
 - ✦ RDA records containing 336, 337 and 338 tags are preferred.

- To view as a MARC record, uncheck Formatted at the top (optional)
 - 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. Double check Capture properties and Click OK (*Likely, these will be preset for your library by UPRLC*)
- Check Match and Load
 - Title control number source = iols
 - Call sources = DEWEY,082,a,N
 - Library = Your library name
10. If a box pops up saying "**Matching record found on...**"
- Write down the matching title control#
 - 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.
11. If a box pops up saying "**The Call Number...already exists...**"
- Type **AUTO** (MUST BE IN ALL CAPS!!!!) into the box
 - Click Ok
 - Save to the database
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
 - 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 if needed
 - Change Class Scheme to DEWEY or LC
 - Click Save
 - Continue searching in SmartPort (if connection has timed out, close the search window and re-connect to the databases)