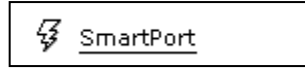


Connecting to SmartPort

When adding new titles to your library catalog, **be sure to check your own database first**. If there is no existing record there, then use SmartPort to locate one.

1. **Click** on Cataloging Wizard group.
2. **Click** on SmartPort Wizard.

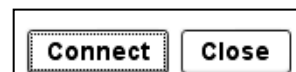


3. **Select** the servers to which you want to connect. Always search **CRC** and/or **LC** before going to OCLC WorldCat!

| Gateway name | Description | Selected |
|--------------|---|--------------------------|
| CRC | INFOhio Catalog | <input type="checkbox"/> |
| LC | Library of Congress | <input type="checkbox"/> |
| OCLC | WorldCat Subscription | <input type="checkbox"/> |
| TEMPL | INFOhio Template (for Original Cataloging of Materials) | <input type="checkbox"/> |

- **CRC** – Curriculum Resource Catalog - this is the INFOhio catalog of MARC records, updated weekly with records from INFOhio libraries around the state. (Combined the former ABRI, INFO-DEDUP and INFO-MEDIA catalogs) **Use this catalog as your first search choice.**
- **LC** – Library of Congress – this only contains records of items published in the U.S. Typically, you will find your “older” items here.
- **OCLC** – WorldCat - this database gives you access to the largest selection of MARC records in the world.
- **TEMPL** – this database contains only templates for local items, equipment, and original records.

4. **Click** the Connect button at the bottom of the screen. Search screen displays.




NOTE: To access the Z39.50 SmartPort targets for importing MARC records, please see the Workflows installation guide for the necessary IPs and ports that need to be open through any firewalls. If you are having trouble connecting to any of the databases, notify your Networking staff that they **need to allow outgoing UDP and TCP traffic** to the addresses listed:


<https://www.infohio.org/library/workflows-handbook/category/installation>


SmartPort Helpers and Tips


a. Use the arrows on the helper menu to move through the title list screens of a database. For example, highlight a title in the database you wish to view, click the right arrow, and the next page of titles will display.



b.  Show / hide search box – toggles the search box off and on. When it's off, it gives you more screen to view title lists.

c.  Show / hide results list. Toggles your hit list off and on.

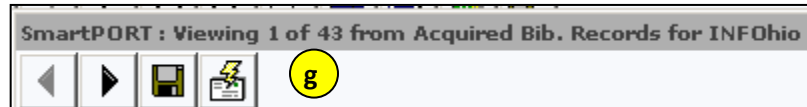
d.  You can use the Change Search Pane View icon to change the search window to a basic or labeled search window (labeled is the default).

e.  Change Gateway – allows you to connect or disconnect from a selected database without leaving SmartPort.

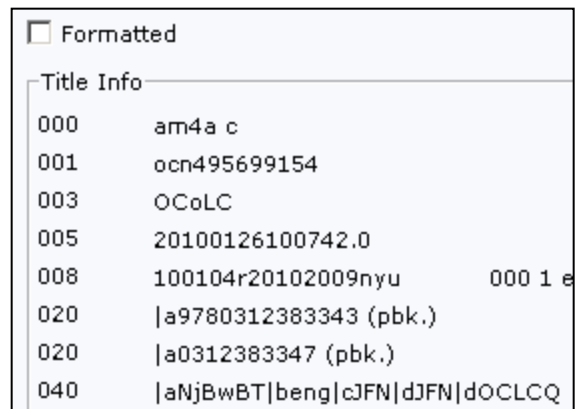
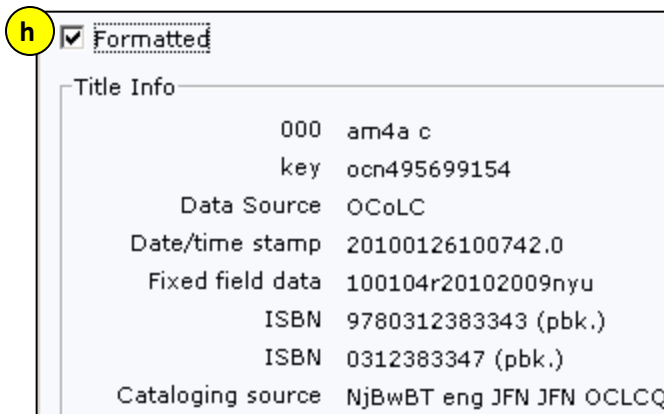
f. **Sorting Lists** - You may sort the columns by clicking on the colored column heading. This only sorts visible titles, not the complete list if it's continued on multiple screens.



g. When you have a title displayed, use the next and previous arrows to navigate through the list of titles. Also note the record number at the top.



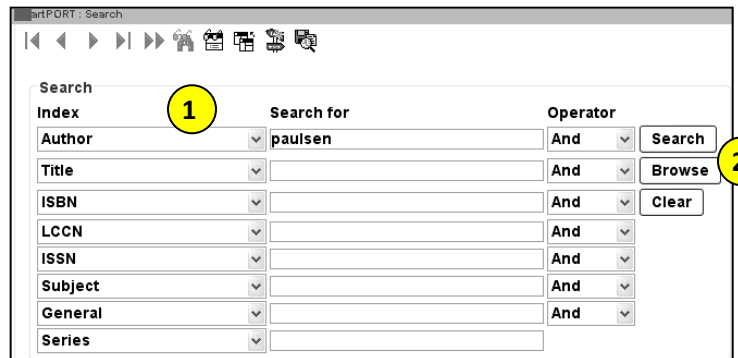
h. Checking the Formatted box will give you a descriptive display of the MARC tags. Unchecking the Formatted box, will show the MARC tags.



Obtaining a Record

1. In the Search window Search area, **select** an Index and **type** the Search string.

- Start your searching with ISBN. Using your barcode scanner, scan the ISBN into the appropriate search box. You can also type it in.
- If no hits, keep searching by title, author, or a combination of title and author



2. **Click:**

- Search to display search results.
- Browse to begin browsing a connected server.
- Clear to clear the search terms and start another search.

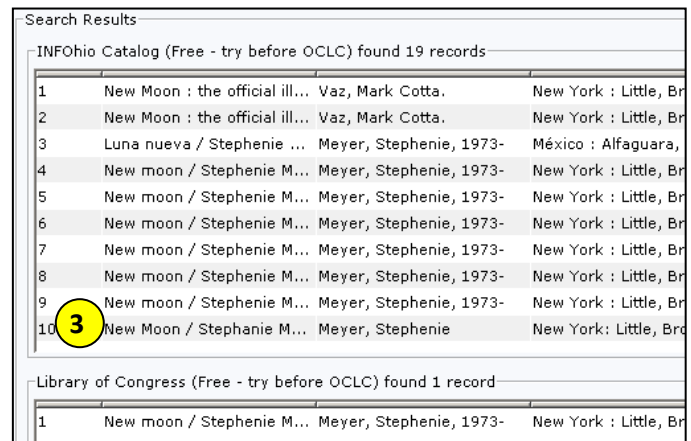
Search Hit List Window displays.

Search results are grouped by database and are numbered.

3. **Select** a title and **click** the display button to review the bibliographic record.

NOTE: You can only display titles from one database at a time. For example, view the records in CRC (INFOhio Catalog). If you don't like any, close the results window. Click on a title from Library of Congress and display those.

TIP! When selecting a record, keep in mind:



A record **MUST** match your item's:

- Title
- Author
- Physical Description (within a few pages is acceptable)

Get as close as possible to:

- ISBN
- Publication info – It's OK if the publishers are part of the same organization (ex. Puffin and Penguin; Scholastic and Levine). Look at the publisher identifier in the ISBN:

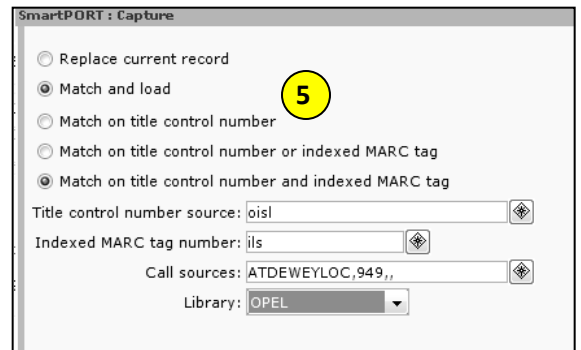
978 **05450** 10221

05450 10225

978 **05450** 29377

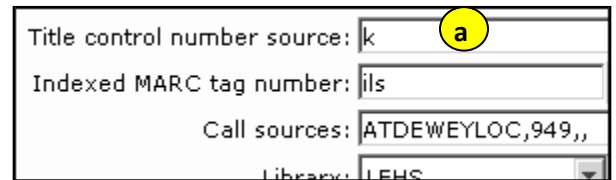
4. When you have found a record that matches your item, **click** the Capture button at the bottom of the screen.

5. **Click** OK to accept the defaults for load options previously set up in Properties or enter new changes here.



NOTE : Other load options:

a. If you wish to load the record as a **NEW** record (**not OVERLAY or MATCH**), remove oisl from the Title Control Number Source and replace it with "k". The record will load as new with a unique Title Control number. Use this method when loading:
 - **SET records**, which overlay each other due to "set ISBN"
 - **TEMPLATE records**



b. If you want to **overlay a specific record** in your database, close all wizards in Workflows. Then open the record you wish to replace in Call Number and Item Maintenance before you go to SmartPort. This will ensure that only the record you want overlaid is open. When you locate and capture the record you desire, **bullet Replace Current Record**.



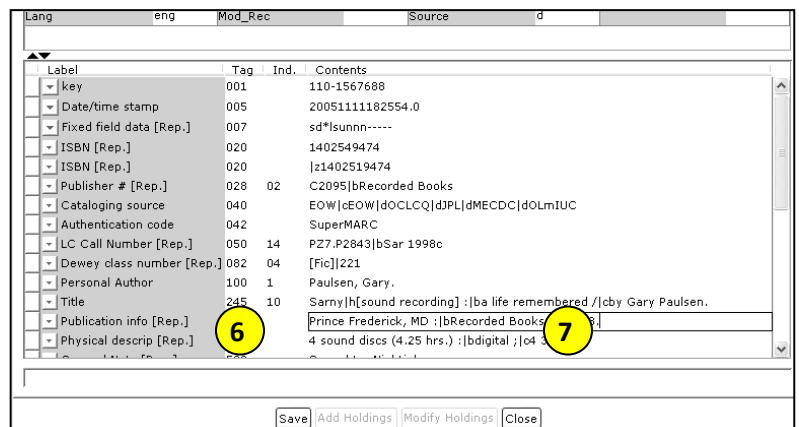
Capture screen displays.

DO NOT edit the call number at this time. The Call Number is Auto generated.

6. **Click** the Save button to save this record in your database.

If you decide NOT to load this record, **click** Close and No to save – record will not be loaded.

7. Record is finished loading when the Save button grays out. **Click** the Close button.



8. You may **either complete** the cataloging for this item (*go to Basic Cataloging/SmartPort/Complete Cataloging*) **or continue exporting** records from SmartPort. Connected servers remain connected until you disconnect them or the server times out.