Sirsí-Importing with SmartPort

SmartPORT is the Z39.50 client included in Workflows that allows you to search other library catalogs, including those of OCLC, LC, UNC, & Duke, and to import MARC records into our database.

An overview of using SmartPort for record import

1. Launch SmartPort
2. Choose destination(s): source(s) of records to be imported
3. Connect to the destination server(s)
4. Search for a record (enter search terms and execute search)
5. Review the hit list and select a record
6. Capture the record
7. Save the record in Workflows—a call number record is created. (A "copy" or item record still has to be created as part of the cataloging process.)

Configuring Smartport

To configure the settings for SmartPort, right click on the SmartPort start-up icon and choose properties

For loading monographic records, set the options as shown below. Note that the Title control number source contains two identical character strings separated by a right slash ("opil/opil"). The four characters before the slash define the hierarchy of incoming control numbers to be matched against flexkeys (title control numbers) in the Unicorn database. The letters after the slash show the hierarchy of incoming control numbers to use to replace the current flexkey value. So, if a match is made between the Symphony flexkey and an incoming ISBN (I) and there is an OCLC number in 001 or 035 in the incoming record, "opil" should replace the ISBN flexkey with the OCLC number.
These are the two options for record loading. You can either replace the record that is currently displayed in Workflows or, with Match and Load, you can import a record based upon specified match points so that an existing record that matches the criteria can be overlayed. Match and Load is recommended as it is a bit easier to predict the results. Use the Replace Current Record option with caution as it will do just that—it will replace the last record worked on with the incoming record from SmartPORT, whether or not it is for the same title, edition, etc. This option can be very confusing if you have more than one record open in Unicorn when you attempt to overlay. Always check the dialog box to ensure that you are overlaying the record that you mean to overlay.
Title Control Number Source

SmartPort allows you to designate the hierarchy for the source of the title control number in order to control record matching and overlay. What this means is that you can specify which value on an incoming record will be matched against the title control key of an existing record in the database. The table below shows the available options. The bolded values are the ones we will use most often.

<table>
<thead>
<tr>
<th>Code</th>
<th>MARC Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>c</td>
<td>Gaylord control number (001)</td>
</tr>
<tr>
<td>g</td>
<td>local number, as is (001)</td>
</tr>
<tr>
<td>h</td>
<td>local number, as is (035)</td>
</tr>
<tr>
<td>i</td>
<td>ISBN (020)</td>
</tr>
<tr>
<td>j</td>
<td>ISBN (021)</td>
</tr>
<tr>
<td>l</td>
<td>LCCN (010)</td>
</tr>
<tr>
<td>m</td>
<td>Marcive key (900)</td>
</tr>
<tr>
<td>n</td>
<td>LCCN (001)</td>
</tr>
<tr>
<td>o</td>
<td>OCLC number (001)</td>
</tr>
<tr>
<td>p</td>
<td>OCLC number (035)</td>
</tr>
<tr>
<td>q</td>
<td>Laserquest number (001)</td>
</tr>
<tr>
<td>r</td>
<td>RLIN number (001)</td>
</tr>
<tr>
<td>s</td>
<td>ISSN (022)</td>
</tr>
<tr>
<td>2</td>
<td>WLN key (035)</td>
</tr>
</tbody>
</table>

Thus, the value opil means that the system will look in the incoming record first for an OCLC number stored in the 001 field (o). This value will be compared against the flexkeys of the existing records in the database. If a match is found, the existing record will be overlaid. If no match is found, the process continues, with the system checking for a match with an OCLC number stored in the 035 field (p), then an ISBN in the 020 field (i), and finally, an LCCN in the 010 field (l). These values are compared with the title control numbers of the records already in the database and if a match is found, the existing record will be overlaid. (You’ll be notified first.) If no match is found on any of the above values, a new record will be created.

Call Sources

This option allows you to specify the call number type to be used when the call record is created and from which fields in the bib record to take this data. There are 4 values, displayed in the following order: Class scheme, Tag or Entry, S_Subfields, to use, Use last occurrence of field, e.g., LC,050,,N. The scheme is LC, the field from which to get the entry is the 050, all subfields are to be used (since none are specified), and do not use the last 050 (in other words, take the call no. from the first 050).

Library

You can set the default for the library you will be using most often. You will need to remember to change this setting if the item is not destined for this location. You can also change this after import by editing the call no./vol. record.

Format

Set to MARC (even for serials). The incoming record leader values will choose the appropriate format in any case.

Searching with SmartPORT

To launch Smartport, use the lightning bolt icon:

This will bring up a list of destinations from which to choose. Click in the box under “Selected” to indicate your choice, then click on Connect to connect to the selected catalogs. You can choose to search more than one destination by toggling more than one box.
Clicking on Connect will bring up a search box with drop downs naming the index to search, an area to enter search terms into and a Boolean operator to establish the logic for searches using more than one index. Thus, you could search for AUTHOR=Shakespeare AND TITLE=lear, resulting in just the entries for Shakespeare's King Lear, or you could use NOT and get every title by Shakespeare except King Lear. Results appear below the search arguments.
Browse vs. Search in SmartPORT

When initiating a search against a target catalog you should generally use the Search button. Many Z39.30 servers have not enabled browse searching and will show an error when you try to submit such a search. Therefore you should generally use keyword searching, "search" as opposed to "browse".

That being said, it is quite possible to browse other Sirsi/Dynix libraries by access point and receive a list showing your heading and other headings that would appear nearby in the index searched. Examples of browse searches by author and subject are shown below. The Sirsi/Dynix libraries listed in our SmartPort implementation are NCSU, PENNSTATE, and VIRGINIA.
Tips

- When doing any kind of search, do not use punctuation:
  - Shakespeare william, NOT shakespeare, william
- Case does not appear to matter.
- Because "search" is a keyword search, you need not type in every word of a title or name, and the word order does not matter, e.g., "mockingbird kill" will retrieve the title "to kill a mockingbird"
- If your search string contains a word that looks like a Boolean operator (and, or, not), enclose the entire title in single quotes or leave the operator out.

Although not every Z39.50 destination is indexed in the same way, here is some info we have found on indexing in LCMARC and OCLC:

- An author search will index on 1XX and 7XX, except for 730 and 130. It does not index 8xx.
- A title search will index on 245, 440, and 8xx. It does not appear to index on 505, 240, 130, or 830.
- The ISBN search (by itself) seems to be quite reliable.
- Attempting to combine ISBN with another field doesn't yield reliable results.
When the search is executed, you may select among the results and choose the record you wish to import. To page through the results while displaying the full record use the Display button and then the left and right arrow buttons. Once you’ve selected a record, click on the Capture button to begin the import process.

Once you click on Capture you will see a box displaying the default behavior defined by the SmartPort wizard’s properties settings. Here you can change the settings if you like, changing the Library, call number sources, or overlay behavior. Click ok to display downloaded record in a editable window.
If there is currently no match in the system you will see a record in a usual Sirsi edit window. You can edit this record immediately, or you can first save it to the local database. Once you are finished editing the record, hit Save to add it to NCSU's catalog. If you decide that it is not the record that you wanted, simply Close the record and it will not be added. If you saved the record, a call number record will automatically have been created, but you will still need to add an item record using the Add Item wizard.
A match with an existing record is found (Match and Load)

If SmartPORT detects a match based upon the designated match criteria, a message will be displayed showing the match point and asking you to verify that you wish to overlay the current record. If there is already a call number record in Symphony with an LC call number and item record, you will see an error dialog box indicating that a new auto call number record must be created.
If you did not intend to create a new call number record, you will need to delete the extra call number after overlaying the bibliographic record.