

Symphony SmartPORT Property Settings for Record Import

In order to import bibliographic records from OCLC, LC, or UW, the SmartPORT settings need to be entered on each computer terminal where record importing will take place. These settings are retained so you do not have to set them each time you logon.

1. To set SmartPORT settings in the Java Client:

Select the Cataloging toolbar. Right click on the SmartPORT wizard to access the properties for that wizard.

Fig. 1 Set Properties

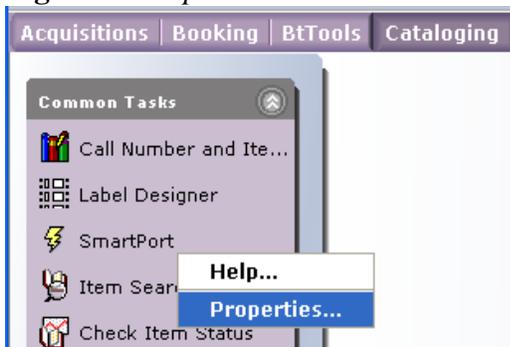
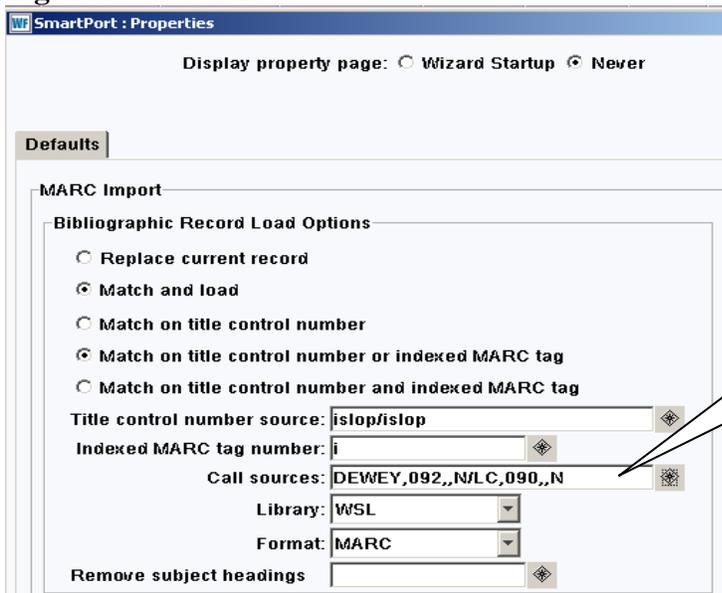


Fig. 2 Match and Load



Use only the entry that matches your library's primary classification scheme. If using Dewey call number, enter DEWEY,092,,N. For libraries using LC call numbers, enter LC,090,,N



****Be sure to set this Library prompt to your own library's name. Use the down arrow to find your library.**

2. Bibliographic Record Load Options:

Replace Current Record” is the option that enables you to overlay a record in WYLD. This means that you would be replacing the last bibliographic record you modified in WYLD with the record currently being viewed within SmartPORT. This is useful for replacing bibliographic records that provide inadequate or incorrect access, such as on order records.

“Match and Load” is the default option that should be checked. This option is based on the values in the Title Control Number Source, Call Sources, and Library. If the system finds a matching record, a window displays indicating what kind of match was used and the matching number. For example: *Matching record found on LCCN (010) -- 49009989.*

For record matching based on a control number, click on the 2nd option as shown above. “Match on Title Control Number or Indexed MARC Tag.” The record is considered a match if the title control number of the bibliographic record matches one of the specific Title Control Number Source Fields in the imported record, or if one of the standard matching numbers from the incoming record finds a match in the WYLD database indexes. These matching numbers are listed in the Indexed MARC Tag Number Field and are described below.

3. Title Control Number Source: islop

These are the match points which you specify from entries in the bibliographic record that will be checked against the incoming record. The *i* of *islop* represents the ISBN; *s* is for the ISSN for serials; *l* represents the LC number; *o* is the for the OCLC number when it appears in an 001 tag on the bib record; *p* represents the OCLC number when it appears in an 035 tag on the bibliographic record. These letters are entered in lower case and can be pulled into the datawell by the system when you use the gadget to access the list of options for this title control number source.

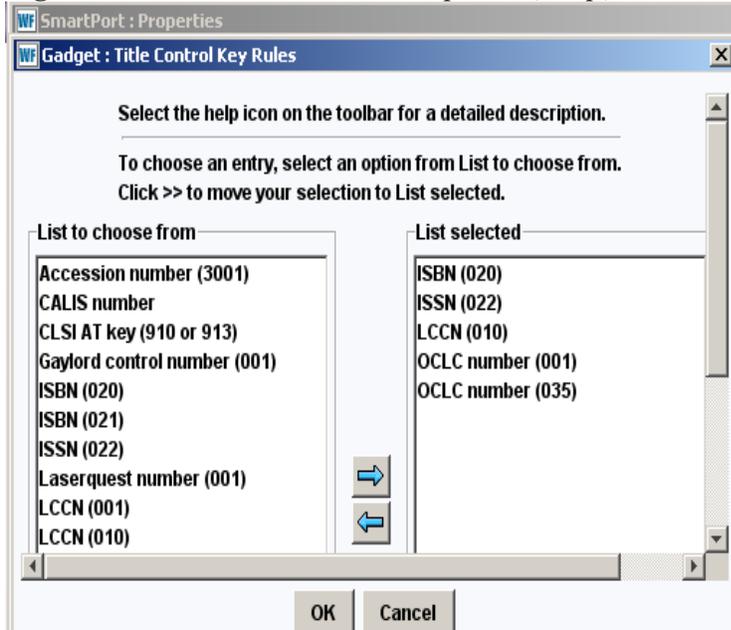
Click on the gadget next to the entry to create the options for that entry as illustrated by the arrow in Fig. 3A below.

Fig. 3 (A) Title Control Number Source



The screenshot shows a dialog box titled "Title Control Number Source". It contains several input fields and buttons. A red arrow points to the "Title control number source" field, which contains the text "islop/islop". Other fields include "Indexed MARC tag number" with "jo", "Call sources" with "DEWEY,082,,N/LC,050,,N", "Library" with "WSL", and "Format" with "MARC". There is also a "Remove subject headings" checkbox and "OK" and "Cancel" buttons at the bottom.

Fig. 3 (B) Title Control Number Options (islop)



Select options from the column on the left and use the arrows in the middle to move those options to the list on the right. After selecting the options shown, in the order shown, click **OK**.

By selecting these options in the gadget, you have created the abbreviation *islop* (in lowercase) in the datawell for the Title Control Number Source. The system checks the bibliographic database for a title control match on the first Title Control Number Source value. If no match is found, the second Title Control Number Source is checked, and so on, until all values have been checked.

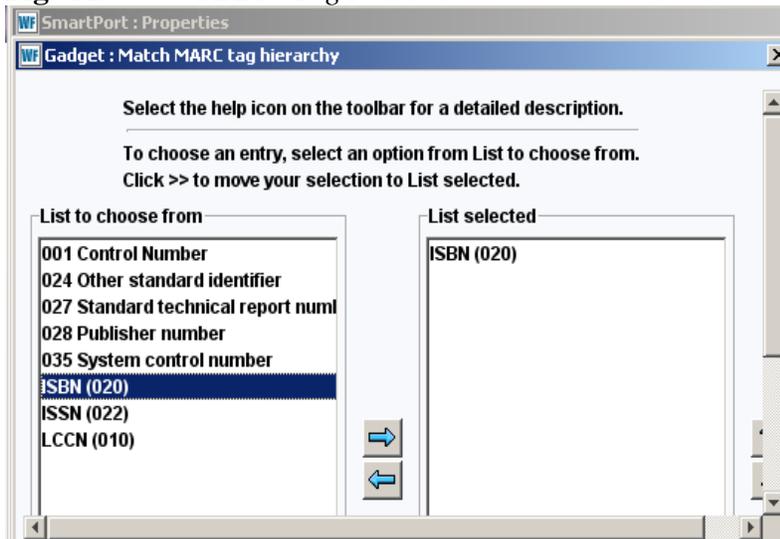
The Title Control Number Source determines whether the title control number of the existing record is replaced or retained. If an existing WYLD record has a title control number that is not comprised of one of these values, it should be replaced with a title control number that is one of these source values so that duplicates are not created in WYLD if the same record is brought into the system again. For example: The existing WYLD record has the title control number AFS-0704. You would want the system to replace this number with one of the Title Control Number Source options. If the incoming record from OCLC has only an LC number, you would want to be sure the system uses that to replace the AFS-0704 so that the new title control number would be 149009981.

In order to make the system replace the old title control number, you need to repeat the *islop* entry in the Title Control Number Source and separate the second entry from the first one with a slash. The Title Control Number Source should appear as: *islop/islop*. The system will not automatically create the slash or the second entry of islop.

****Note:** A Title Control Number will have as its first element the lower case letter of the Title Control Number Source *islop* depending on which value is used to create the title control number, e.g., i9780385159005

4. Indexed MARC Tag Number:

Fig. 4 Indexed MARC Tag Number



Select the ISBN as the first MARC tag option for additional match elements. Other options may be selected such as the 024 which is a tag found in AV materials. Highlight an option on the left and use the arrow in the middle to move that selection to the column on the right.

5. Call Sources: LC,090,,N or DEWEY,092,,N LC,050,,N or DEWEY,082,,N

Use the gadget next to the Call Sources datawell to specify the source of call number information you wish to use for your library. (see figure 3A)

Fig. 5 (A) Call Source for LC

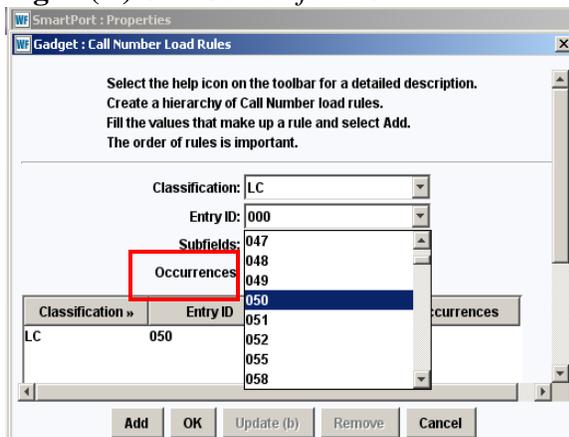
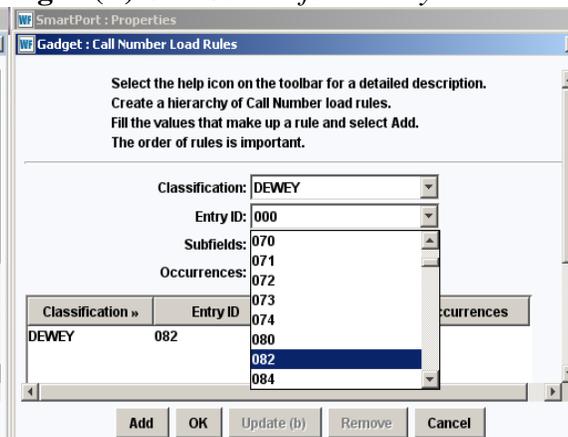


Fig. 5 (B) Call Source for Dewey

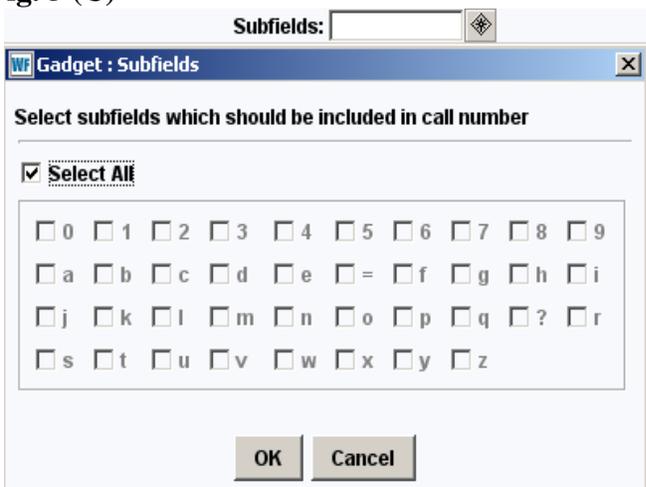


a) Use the down arrow next to the *Classification* datawell to select the type of call number for your library: **LC** or **DEWEY**. Your library may use other types of call numbers as well but this sets the default for the classification that comprises the bulk of your library's collection. Other possible options could be **SUDOC** (Federal Documents), **WYDOCS** (Wyoming State Documents), or **NLM** (National Library of Medicine). **AUTO** may also be used if you don't wish to specify a classification, but will result in the creation of a default XX call number.

b) Use the down arrow next to the *Entry ID* datawell to select the tag from the bibliographic record that contains the type of call number your library uses. For LC libraries, select Entry ID **090** or **050**; for Dewey libraries, select Entry ID **092** or **082**. If using one of the other three most common classifications, select Entry ID **086** for both SUDOC and WYDOCS, and select Entry ID **060** for the National Library of Medicine call numbers. If you select Auto as your default classification, select Entry ID **000**.

****Note:** Using the local call number tags (090 for LC and 092 for Dewey) will likely result in the creation of an XX auto-generated call number as those tags aren't always in the bibliographic record. This requires that you change these xx call numbers to your library's real call number information. However by allowing the system to auto-generate the call number, you will be less likely to get the message that "Call Number is already used."

Fig. 5 (C)



c) For *Subfields*, use the gadget next to that option to confirm that **Select All** is the default setting.

Click **OK**.

d) For *Occurrences*, select **First**. (see figure 5A)

Once these four options (a-d) have been selected, click the **Add** button to add those selections to the table directly above the buttons. (see figure 5A) If more than one set of Call Number Source options is desired, repeat steps a-d and click the Add button to add the second choice to the table. When finished click **OK**.

The two Call Number Sources illustrated here: **LC,090,,N/LC,050,,N** are created as the result of adding both of these selections to the table of the Call Number Source option. The system creates them in upper case values. The system looks for a call number in the incoming record based on the type of call number you've specified here. In the illustrations provided here, the system looks for an LC call number in the 090 tag. It will include all subfields for the call number and it will look at only the first occurrence of that 090 tag. The second part of the illustration tells the system to continue looking for a different tag for a call number if an 090 tag isn't present in the bibliographic record. Therefore, if there is no 090 tag, the system will look for an LC call number in an 050 tag. It will include all subfields for that call number and it will look at only the first occurrence of an 050 tag. **The Dewey equivalent is: **DEWEY,092,,N/DEWEY,082,,N**

6. Library: Enter your short code to define your library, e.g., WSL. View the code list at: <http://will.state.wy.us/wyld/technotes/libcodes.cfm>

Fig. 6 Library

A screenshot of a web form with two dropdown menus. The first is labeled 'Library:' and has 'WSL' selected. The second is labeled 'Format:' and has 'MARC' selected.

7. Format: MARC (In Sirsi, this is the default format for print materials)

Fig. 7 Format

A screenshot of a web form with two dropdown menus. The first is labeled 'Library:' and has 'WSL' selected. The second is labeled 'Format:' and has 'MARC' selected.

8. Remove Subject Headings:

Fig. 8 Subject Heading Options

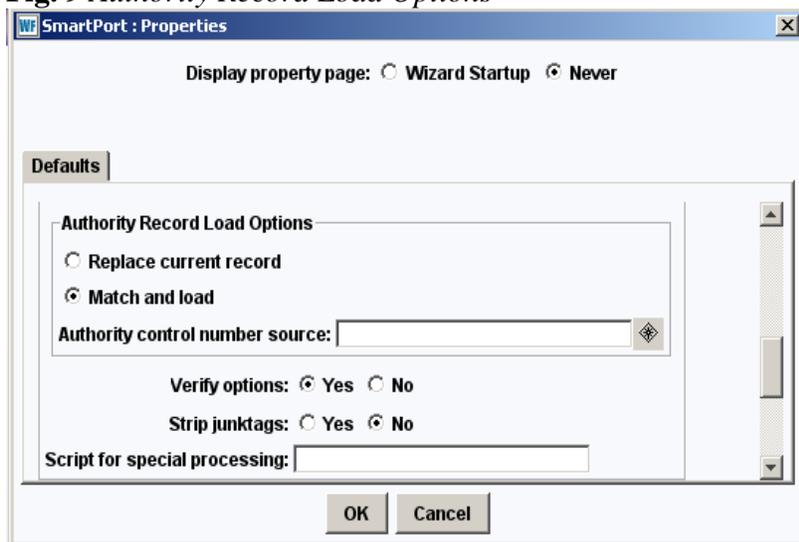
A screenshot of a dialog box titled 'Gadget : Subject source'. It contains instructions: 'Select the help icon on the toolbar for a detailed description.', 'To choose an entry, select an option from List to choose from. Click >> to move your selection to List selected.', and 'Select subject headings (based on the 2nd indicator values) to be removed from the record.' Below the instructions are two lists: 'List to choose from' and 'List selected'. The 'List to choose from' list includes: 'LC Subject Headings (0)', 'LC Subject Headings for Children's Literature (1)', 'National Library of Medicine Subject Headings (2)', 'National Agricultural Library Subject Headings (3)', 'Source not specified (4)', 'National Library of Canada Subject Headings (5)', 'Répertoire des vedette-matière (6)', and 'Source specified in subfield 2 (7)'. There are two arrow buttons between the lists: a right-pointing arrow and a left-pointing arrow. At the bottom are 'OK' and 'Cancel' buttons.

WYLD is not currently using these options to remove subject tags on imported records using SmartPORT. A number of foreign language headings come into the system coded as the last option displayed above: Source specified in subfield 2 (7). This notation means those tags formatted like genre headings that have a subfield 2 with an indicator of 7. With this setting as it currently is constructed, there is no way to distinguish genre headings which are desirable in WYLD from Dutch headings or Sears headings.

9. Authority Record Load Option:

The defaults in this portion of the SmartPORT settings do not need to be changed. We do not load authority records in this manner.

Fig. 9 Authority Record Load Options



10. Hit Limit for Brief Display:

Scroll past the Authority Record Load option to the last portion of the SmartPORT settings.

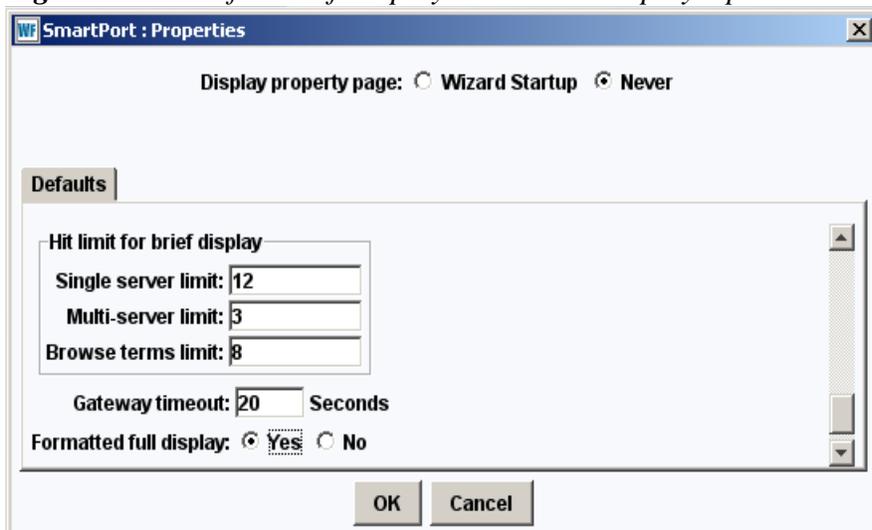
The default settings are displayed here. *Single Server Limit* can be increased to 45. This sets the number of brief records to display in the Search Results hitlist for a single server search, i.e., OCLC is a single server, LC is another single server.

Multiple Server Limit is set at 3 as the default so only three brief records will display in the Search Results hitlist if multiple servers are searched at once. For example if you were searching OCLC and LC at the same time, you'd see only 3 entries on the brief record hitlist for OCLC and 3 entries on the brief record hitlist for LC. This limit can be set as high as 45 if searching two servers at a time. If three servers are searched simultaneously (OCLC, LC, and UW), not all three will display all 45 entries in the brief record hitlist.

Browse Terms Limit is set at 8 as the default for the number of browse terms to display but can be increased to 10. The Browse search option works only in OCLC.

****Note:** Setting large numbers for the brief record display hitlist may impact retrieval time from the selected servers.

Fig. 10 Hit Limit for Brief Display/Formatted Display Options



Gateway Timeout default is 20 seconds. This is the length of time the SmartPORT wizard allows for the process of connecting to a server before it times out if no connection can be made.

****Note:** This should not be set to zero as that would result in the inability to connect to any server at all.

Formatted Full Display sets the default of how a record retrieved will display in SmartPORT. **Yes** for a formatted display results in a display with descriptive labels instead of tag numbers. **No** for an unformatted record display means the record will display with MARC tag numbers and no descriptive labels. (Note that after a record has been retrieved in SmartPORT, it is possible to change the Formatted Display setting on a record by record basis by clicking in the box next to that Formatted display option.)

Click the **OK** button when all desired SmartPORT property setting have been made.