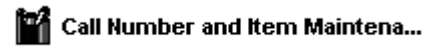


SmartPort - Completing the Cataloging Process

1. **Click** on Call Number and Item Maintenance Wizard.



2. **Click** on Current title to edit the new record, or search for record, if not current.

Call Number and Item Maintenance screen displays.

3. **Click the Add Item button** at the bottom of the screen.

4. **Modify** the call number.

- a. **Change** Class scheme from *AUTO* to *ATDEWEYLOC*.

Do not change the shelving key.

If you check Shadow Call Number, all items connected to that call number will be shadowed (hidden from view in the online catalog.)

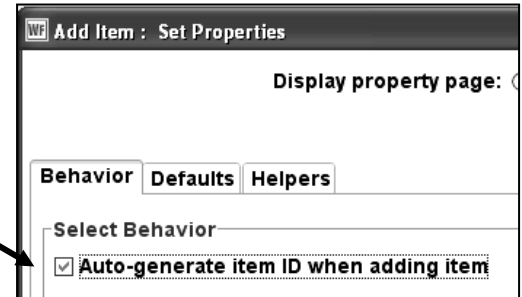
5. **Add Item Information**

- a. **Item ID** – you should select one of the following procedures to enter item IDs. Select the one method that works best for your school:

- Dumb barcodes –**scan or type** the barcode number. If you scan the barcode, the number will be saved to the record and appear on the left side of the screen. If barcode validation is turned on for your district, you will be able to type the barcode shortcut.
- Barcode Shortcut – If you are using this feature, you must have auto-generate barcodes turned off in properties. You will be able to type just the significant digits with an x. However, you will need to keep track of the significant digits.

Ex. 32612000100069 could be typed as 10006X

- Auto-generate barcodes – A new barcode number will automatically be generated. Check with your ITC to request this function be set up for your district. You also must have Auto-generate item ID checked in properties (Right click on the Add Item wizard > select properties > Behavior tab > check Auto-generate item id).



b. Other Item Information fields:

- Type:** Use the Drop Down menu to select the item group.
- Shelf Location:** Leave to default – Available
- Material Type:** Use the Drop Down menu to select the material type (this is the icon that will display in the online catalog).
- Media Desk** – leave blank
- Total Checkouts** – leave blank – the system generates this number.
- Copy Number** – system generated – do not change.
- Item Library** – your library should be there. If a different library appears, you have selected the wrong call number. Click Delete and go back to Step 5a
- Funding Source** – optional
- Number of pieces** - indicates the number of pieces associated with a particular copy. If a value of two or more is entered in the number of pieces field, the Circulation wizards will require an override code to check out and check in the item to remind the library staff to check for number of pieces associated with this item.
- Price** - Enter Price

- Permanent – leave checked
- Circulate – leave checked
- Shadow item – check if you do not want the item to appear in the online catalog.

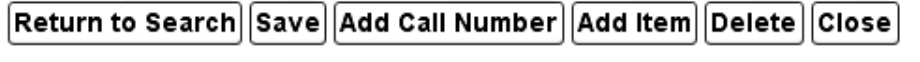
6. **Extended Information**

Circ Note – appears when the item is checked in and checked out. Use for comments such as 10 copies in set, CD at desk, etc.

Public – enter any comments you want to appear in the online catalog such as Donated by the Smith Family.

Staff – enter any comments you want to appear only in Workflows such as PO # 1234.

7. **Select** from options:



- Return to Search - Return to the search list to look up another title in Call Number and Item Maintenance.
- Save – this saves your new record.
- Add Call Number - Add another call number to the same title.
- Add Item - Add another item to the call number you just added.
- Delete an item from this record.
- Close window

8. When finished with this record, **click** the Close button at the bottom of the screen. You will see the SmartPort screen and can continue searching for new records.

NOTE: *It is important to close the Call Number and Item Maintenance screen if you will be importing multiple records from SmartPort. This will allow the record you export to be the “current record” in Step 2 above.*

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