How-to use 🔲 SmartPort
to import bibliographic records

Only use SmartPort if …
- you are unable to find a record in our shared catalog
- you're comfortable looking at a MaRC bibliographic record and identifying key components.

- **SmartPort is not a tool for beginners without prior library experience or direct supervision.**
- **You can always request records from** support@superiorlandlibrary.org
    - Send us **Title**, author, **ISBN** (no spaces or dashes) and **number of pages** from the book. (ISBN stands for International standard book number and is found on most books published since the late 1960's. Older ISBN's are 10 digits and start with a 0 or 1, newer ISBN's (since late 1990's) are 14 digits and start with 97. Usually it's printed by the publisher on the lower right corner of the back cover of a book and can be captured easily with a barcode scanner.)

Why it matters:

When staff import bad records, the items attached to them will generally check out fine when a patron finds the item on the shelf. So on one level, all the information in a record can be wrong, and the record functions. However, the item will be harder to find in the public catalog and even less likely to be findable for inter library loan use. We share our records within our group and with other libraries throughout the state in the melcat system.

We have a pretty good public catalog that allows patrons to…
- search by title, author, keyword, or subject
- filter by format, interest level, fiction and nonfiction
- sorted by date of publication, author last name or title.

These features break down when we bring in bad records. **We want our records to work** for both **checkout** and **discovery**.

How to use SmartPort to obtain bibliographic records:
1. In Workflows, set up your workspace to
    - first search locally,
    - then search outside our system via SmartPort,
    - be prepared to modify records you bring in before you add your item.

    Here's one way to **set up your tabs**:
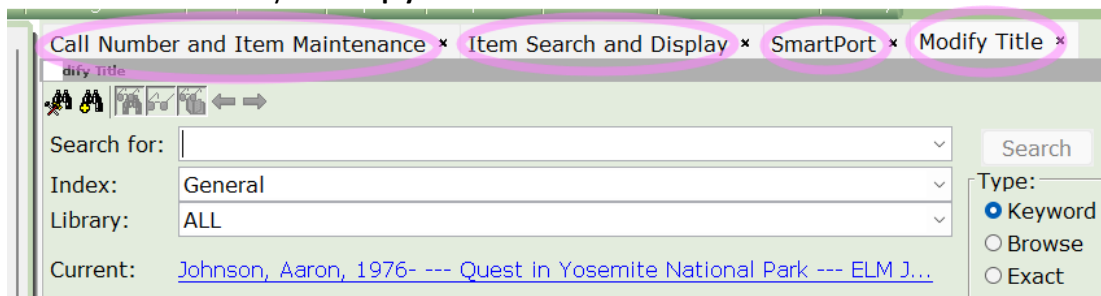
2. **search** for the title **by ISBN** (General index, Keyword) **and by Title** (Title index, Browse and Keyword).
   - If the title matches, but the ISBN does not, check the Bibliographic tab to see if the description matches. Look at…
     - author, (line 100)
     - illustrator, (line 700)
     - format, (line 338)
     - number of pages or discs (line 300).

Ivy + Bean get to work! / Barrows, Annie

Control Bibliographic MARC Holdings Call Number/Item Bound-with Orders Serials Ctrl Selections

Shadow title: N

..	Tag	Ind.	Contents
	040		DLC|beng|erda|cDLC|dBDX|dYDX
	020		9781797205106|q(hardcover)
	020		1797205102
	050	00	PZ7.B27576|bIbc 2021
	082	00	[Fic]l223
	100	1	Barrows, Annie|eauthor.
	245	10	Ivy + Bean get to work! /|cwritten by Annie Barrows + illustrated by Sophie Blackall.
	246	3	Ivy and Bean get to work!
	246	30	Get to work!
	264	1	San Francisco, California :|bChronicle Books, LLC,|c[2021]
	300		127 pages |c 20 cm
	336		text|btxt|2rdacontent
	337		unmediated|bn|2rdamedia
	338		volume|nc|2rdacarrier
	490	0	Ivy + Bean ;|vbook 12
	521		Ages 6-9.|bChronicle Books.
	520		After meeting Herman the Treasure Hunter during a career fair at Emerson School, every looking for treasure and finding it--except for Ivy and Bean.
	650	1	Buried treasure|vFiction.
	650	1	Schools|vFiction.
	650	1	Occupations|vFiction.
	700	1	Blackall, Sophie|eillustrator.
	994		Z0|bEZP
	596		PETERWHITE ESCPUBLIB HANCOCK ISHPUBLIB PORTAGE SPIES ALPENA IRONWOOD DET

   - If they do match, use **Modify Title wizard to add your ISBN** to the Bibliographic record.
     - Click on an existing 020 field
     - Right click to generate the submenu
     - Select add field above or below

3. If a match cannot be found on the local system, move to the SmartPort wizard to search other databases for a matching MARC record.

4. Select the databases to be searched: **Catalog** (our database), **Melcat** (Michigan wide), and OCLC-yourlibrary (National database). (Exception: *OCLC is not available to schools.*)
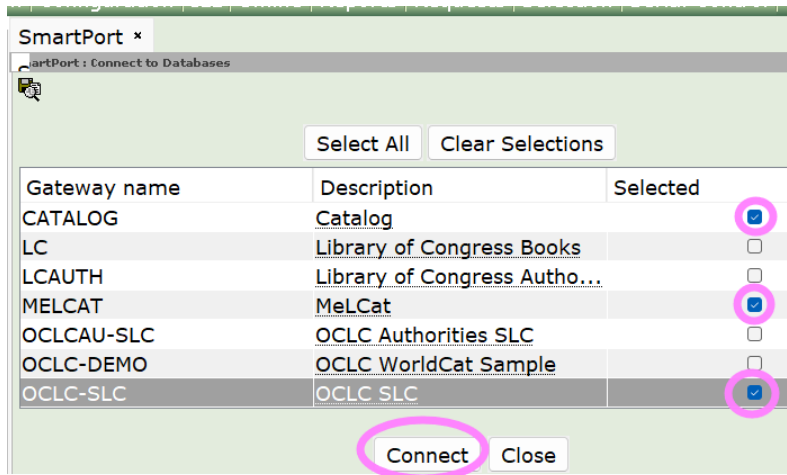
5. Search for your item
    - The default search is for ISBN
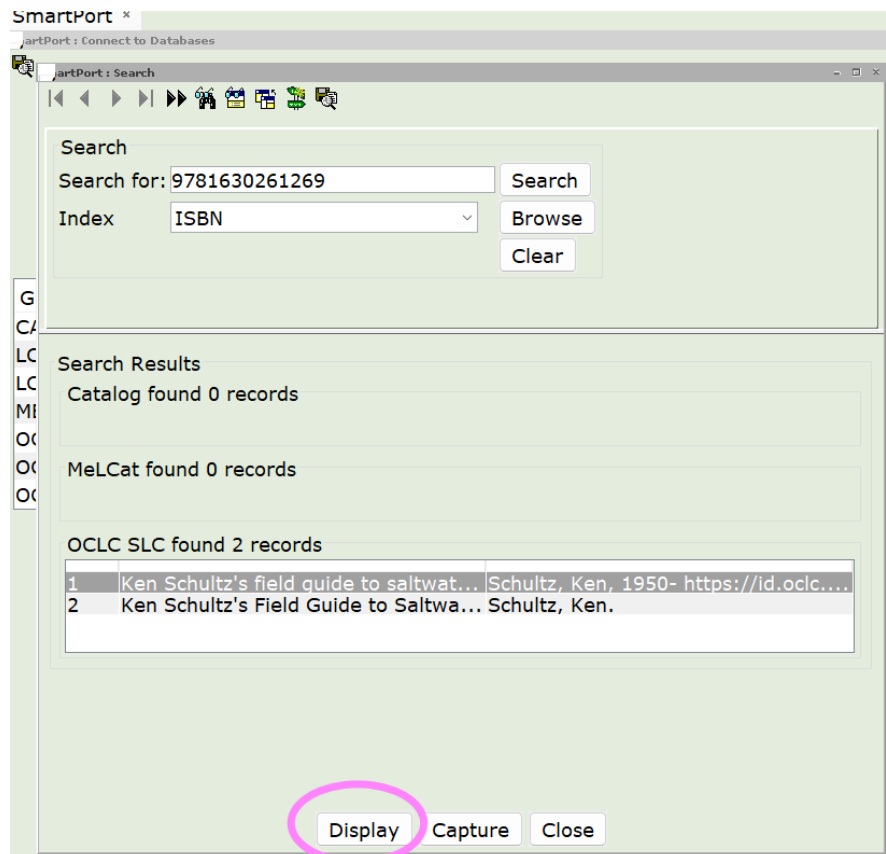
6. Examine the results of your search.
   o Verify that record matches item in-hand. Check the following:
      ▪ 020 ISBN – if multiple formats, pay careful attention to 338 description and be prepared to delete extra ISBN numbers in Modify Title after
      ▪ 100/Author
      ▪ 245/Title
      ▪ Physical Description
   o If not the correct record, use navigation arrows on top and review next record.

This is **not a good record**. You **never** want to **import a record for an online resource when you have a book** in your hand. A record for a book will say "volume" in the 338 field. The Physical description will list the number of pages or say unpaged volume (for a picture book) if it's a record for a book.

Watch out for pre-pub records—stub or minimal records that are meant as place holders until the book is published. These records often lack subject headings, page numbers, descriptions. Sometimes they are obvious - the title is in all caps.

	Tag	Ind.	Contents
Biog			Lang eng Mod_Rec
▾	001		ocn731910786
▾	003		OCoLC
▾	005		20130425172318.0
▾	020		9781451720648
▾	020		1451720645
▾	040		BTCTA|beng|cBTCTA
▾	245	00	Ivy & Bean and the Ghost That Had to Go.
▾	260		|bPaw Prints|c2011.
▾	300		p.|ccm.
▾	336		text|2rdacontent
▾	337		unmediated|2rdamedia
▾	338		volume|2rdacarrier
▾	596		HANCOCKEL LAKEVIEW WHITEFISH BARKRIVER
▾	720		Barrows, Annie.
▾	590		upgrade
▾	720		Blackall, Sophie.|4ilt
▾	994		Z0|bEZP

The bad record above never got flagged till years after it entered the system. In the code it says it's nonfiction, when it's fiction. There's no note that it's part of a series, no description, no summary.

- **Watch for page numbers!** Missing page numbers is the first clue that something is wrong.

|	
Title	Calder strong / Janet Dailey.
Edition	First Kensington hardcover edition.
264	New York, NY : Kensington Publishing Corp., 2025.
264	©2025
Physical description	234 pages ; 24 cm.
336	text txt rdacontent
337	unmediated n rdamedia
338	volume nc rdacarrier
Series	Calder brand ; [5]
Abstract	"At 24, Joseph Dollarhide is struggling to find his place as the future head of his ranching family. His father, Blake, may have been disabled in an accident but he's as domineering as ever. Joseph's childhood friend, Chase Calder, has inherited the rival Calder operation, and for both young men, longstanding battles over water and grass continue. But there's yet another weight on Joseph's shoulders. Years ago, Joseph abandoned his teenage love, Annabeth to court glamorous Lucy Merriweather, a seductive trickster. The affair, of course, imploded, and Annabeth went on to marry a farmer, Silas Mosby, and have two children. But now Joseph has spotted Annabeth and her family in town … and he has no doubt that her oldest, a boy, is his"-- Provided by publisher.
Subject	Ranchers Fiction.
Subject	Man-woman relationships Fiction.
Subject	Vendetta Fiction.
Subject	Illegitimacy Fiction.
Subject	First loves Fiction.

Capture   Close

- Good records contain subject headings (6xx fields) and a summary. Good records usually require scrolling to see all the elements.

7. If a match is found, click **Capture**.

8. Double-check Capture properties and click OK (*Likely, properties will be preset for your library by UPRLC)*
   - o Check Match and Load
   - o Title control number source = iols
   - o Call sources = DEWEY,082,a,N
   - o Library = Your library name
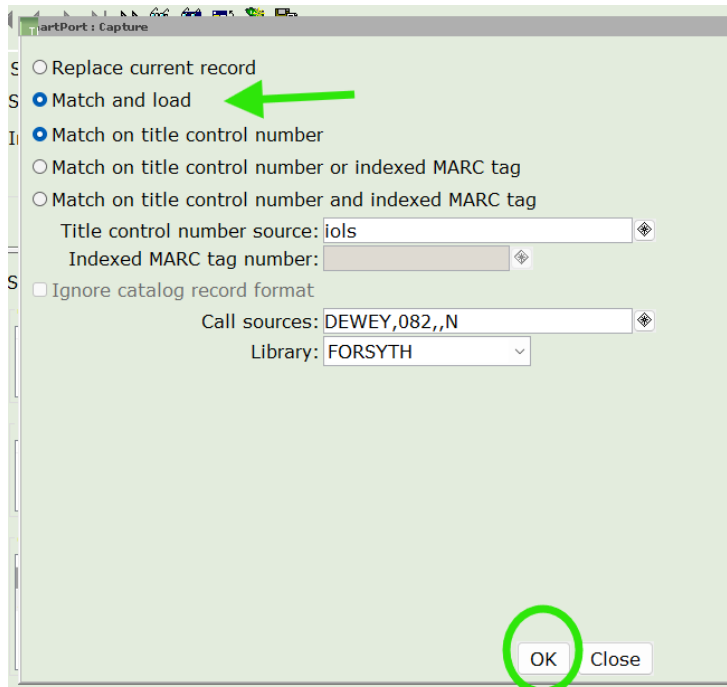
If a box pops up saying **"Matching record found on..."** that means we all have a record and **don't** want to **import** this one.
   - o Write down the matching title control#
   - o Click OK
   - o **Click Close** (NOT Save)
   - o **Click No** (when it asks if you want to save the record)
   - o Search for the record in Call Number and Item Maintenance using the Title Control# index.

   If a box pops up saying **"The Call Number...already exists..."**
   - o Type **AUTO** into the box
   - o Click Ok
   - o Save to the database

9. The last step to the import process (before you are ready for bib record clean-up and adding your item) is to accept the record that is displayed in the next window by choosing **save** and **close**:

If your only choice is a bad record…
- Copy the ISBN into google—see if you can find the publication date from the publisher or Amazon.
- **If you have a pre-pub copy**, note the date of publication on a post-it note and **put the book aside until its on-shelf date**
- If the book is out, use your judgement, if it came out the last couple of days by a major publisher, a good record is bound to turn up in the next few days. Can the book wait?
- If the book is out, only bad records exist, and your patrons are clamoring for it, bring in the bad record.
    - Add the page numbers
    - **Add a 590 field with the word "upgrade"**
    - Don't try to upgrade the record yourself unless you are trained in original cataloging.
        - Records with surface level fixes that don't address all the nuances in the MaRC record code that needed to make for a fully function bib record are confusing. Honestly, it's not helpful and a waste of your time. (I do recommend learning original cataloging if you are interested. Talk to your director or SLC staff to learn more about how to go about this.)

10. **Review** the record you just imported **in Modify Title**
- **Delete ISBN's for different formats** (audiobook, e-book, large print). Paperback, library bound, and hardcover ISBN's can stay if they are all the same page count.
- Add page count if missing in 300 line. Sometimes the week a book is released you will see a very complete-looking record that's missing number of pages and cm. It's OK to capture these records and add this information from your copy.
- Add a 590 note if you are in doubt that the record is fully formed
- **Add |h[large print] to the title field for all large print books**

11. **Add your Item** information in Call Number and Item Maintenance

- o click the Current title-- it should match your item.
- o Click Add Item
- o Enter Item Information (see How to Add an Item)
- o Click Save
- o Modify Call Number to your library's preferred system
- o Click Save