

# 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 the UPRLC cataloger via our record request form: <https://form.jotform.com/260285389598173>

## Why it matters:

When staff import bad records, the items attached will generally check out fine when a patron finds the item on the shelf. 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 invested in a public catalog that allows patrons to...

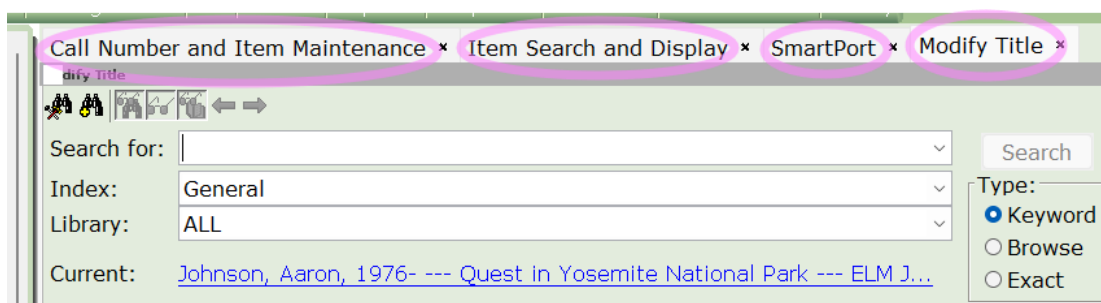
- search by title, author, keyword, or subject
- filter by format, interest level, fiction and nonfiction
- sorted by date of publication, author last name or title.

These features break down when we import 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

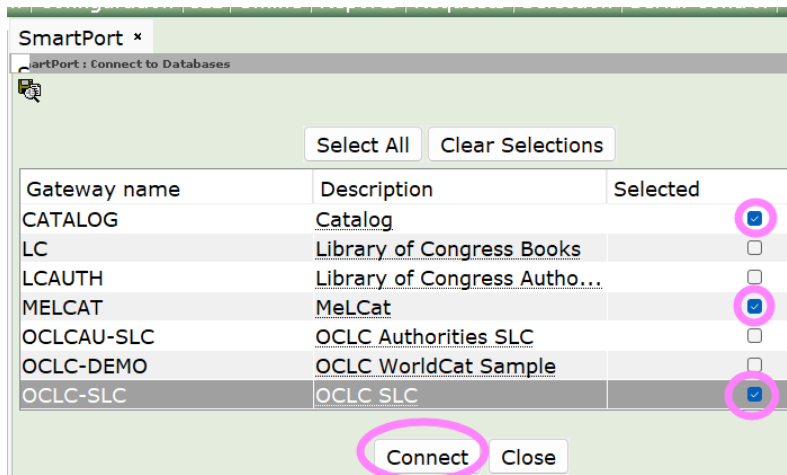
Control Bibliographic MARC Holdings Call Number/Item Bound-with Orders Serials Ctrl Selections

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]I222                                                                                                                                            |
|    | 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 bnc 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 bEZD                                                                                                                                              |
|    | 596 |      | PETERWHITE ESCPUBLIB HANCOCK ISHPUBLIB PORTAGE SPIES ALPENA IRONWOOD DE                                                                              |

- If the description matches, use **Modify Title wizard to add your ISBN** to the Bibliographic record.
    - Click on an existing 020 field
    - Right click to generate a 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.

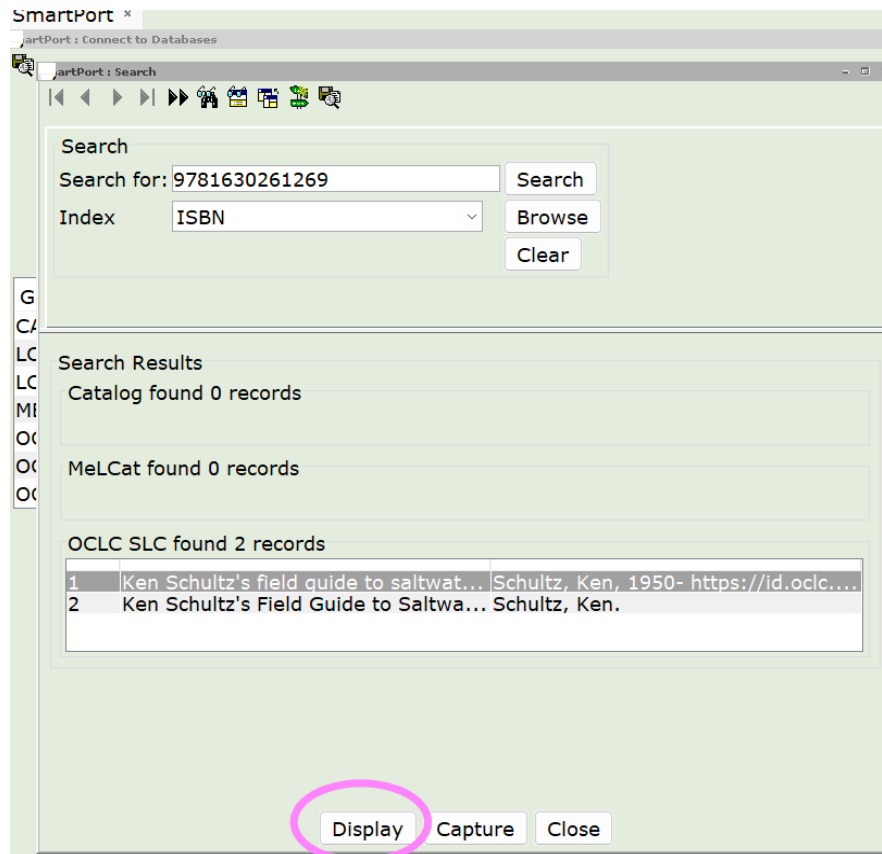
4. Select the databases to be searched: **Catalog** (our database), **Melcat** (Michigan wide), and OCLC-yourlibrary (National database). (Exception: *OCLC is only available to public libraries, not available to schools.*)



The image shows the 'SmartPort Connect to Databases' window. It features a table with three columns: 'Gateway name', 'Description', and 'Selected'. The 'Selected' column contains checkboxes, with the ones for 'Catalog', 'MeLCat', and 'OCLC SLC' being checked. The 'Connect' button at the bottom is circled in pink.

| Gateway name | Description                  | Selected                            |
|--------------|------------------------------|-------------------------------------|
| CATALOG      | Catalog                      | <input checked="" type="checkbox"/> |
| LC           | Library of Congress Books    | <input type="checkbox"/>            |
| LCAUTH       | Library of Congress Autho... | <input type="checkbox"/>            |
| MELCAT       | MeLCat                       | <input checked="" type="checkbox"/> |
| OCLCAU-SLC   | OCLC Authorities SLC         | <input type="checkbox"/>            |
| OCLC-DEMO    | OCLC WorldCat Sample         | <input type="checkbox"/>            |
| OCLC-SLC     | OCLC SLC                     | <input checked="" type="checkbox"/> |

5. Search for your item
- The default search is for ISBN



The image shows the 'SmartPort Search' window. It has a search bar with the text '9781630261269' and a dropdown menu set to 'ISBN'. Below the search bar, there are buttons for 'Search', 'Browse', and 'Clear'. The 'Search Results' section shows that 'Catalog' and 'MeLCat' found 0 records, while 'OCLC SLC' found 2 records. The results are listed in a table with two rows. The 'Display' button at the bottom is circled in pink.

Search for: 9781630261269

Index: ISBN

Search Results

Catalog found 0 records

MeLCat found 0 records

OCLC SLC found 2 records

|   |                                         |                                        |
|---|-----------------------------------------|----------------------------------------|
| 1 | Ken Schultz's field guide to saltwat... | Schultz, Ken, 1950- https://id.oclc... |
| 2 | Ken Schultz's Field Guide to Saltwa...  | Schultz, Ken.                          |

6. Select "Display" to examine the results of your search.
  - 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 import
    - 100/Author
    - 245/Title
    - Physical Description
  - If not the correct record, use navigation arrows on top and review next record.

partPort : Viewing 2 of 3 from OCLC SLC

Navigation icons: Previous, First, **Display** (circled in green), Next, Last, Save, Print, Export

☒ Formatted

Title Info

|                      |                                                                                  |
|----------------------|----------------------------------------------------------------------------------|
| 000                  | am7i0n                                                                           |
| key                  | on1539297207                                                                     |
| Data Source          | OCOLC                                                                            |
| Date/time stamp      | 20251014141345.0                                                                 |
| Fixed field data     | 250924s2025 xx jo 000 1 eng d                                                    |
| Linking field        | m o d                                                                            |
| Fixed field data     | cr cnu---unuuu                                                                   |
| Cataloging source    | TEFOD eng rda pn TEFOD OCLCO                                                     |
| ISBN                 | 9780823463374 (electronic bk.)                                                   |
| ISBN                 | 0823463370 (electronic bk.)                                                      |
| ISBN                 | 9780823456536                                                                    |
| ISBN                 | 0823456536                                                                       |
| Local system #       | (OCOLC)1539297207                                                                |
| Stock number         | 435F26D1-C964-4771-BE1B-D67434AA8892 OverDrive, Inc.<br>http://www.overdrive.com |
| LC call number       | PZ7.R32865                                                                       |
| Dewey class number   | [Fic] 22                                                                         |
| Personal author      | Rex, Adam.                                                                       |
| Title                | 13th Day of Christmas / Adam Rex.                                                |
| 264                  | CN : Neal Porter Books, 2025.                                                    |
| Physical description | 1 online resource.                                                               |
| 336                  | text txt rdacontent                                                              |
| 337                  | computer c rdamedia                                                              |
| 338                  | online resource cr rdacarrier                                                    |
| Audience note        | 04-08.                                                                           |

Capture Close

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 unpagged 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, and descriptions. Sometimes they are obvious - the title is in all caps.

| Biog | Lang | eng                                      | Mod_Rec |
|------|------|------------------------------------------|---------|
| Tag  | Ind. | Contents                                 |         |
| 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  |      | lbPaw 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. The code says it's nonfiction-- it's fiction. There's no connection to the series, no description, no summary.

- **Watch for page numbers!** Missing page numbers usually means it's a bad record

PartPort : Viewing 1 of 2 from OCLC SLC

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.

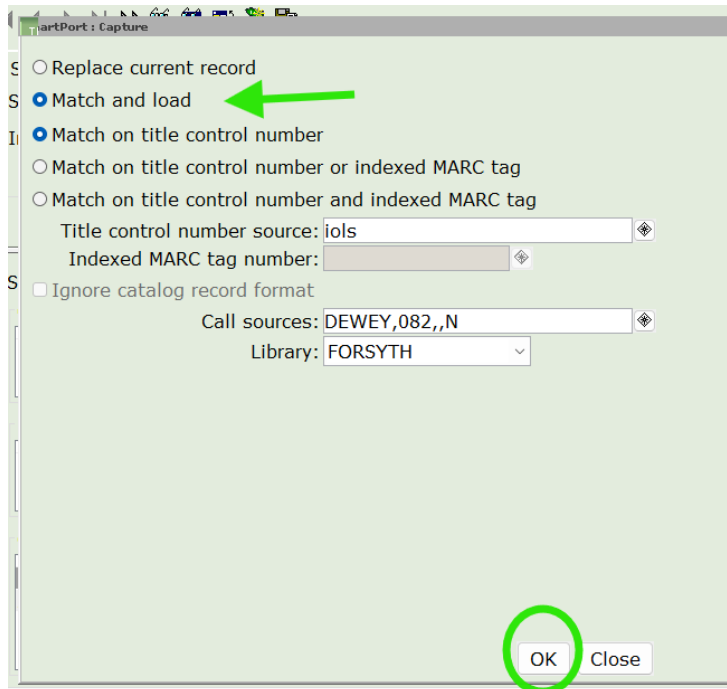
Subject Illegitimacy Fiction.

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** at the bottom of the window.
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 already 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**:

Call Number and Item Maintenance - Item Search and Display - Standard - Modify Title

artPort : Search

artPort : Capture

Control Bibliographic MARC Holdings Call Number/Item

☐ Shadow title

|            |      |          |      |         |        |          |   |
|------------|------|----------|------|---------|--------|----------|---|
| Rec_Status | c    | Rec_Type | a    | Bib_Lvl | m      | TypeCtrl |   |
| Enc_Lvl    | 8    | Desc     | i    | Entrd   | 250319 | Dat_Tp   | t |
| Date1      | 2025 | Date2    | 2025 | Ctry    | nyu    | Illus    | a |
| Audience   | b    | Repr     |      | Cont    |        | GovtPub  |   |
| ConfPub    | 0    | Festschr | 0    | Indx    | 0      | Fiction  | 1 |
| Blog       |      | Lang     | eng  | Mod_Rec |        | Source   |   |

| Label             | Tag | Ind. | Contents                                                                           |
|-------------------|-----|------|------------------------------------------------------------------------------------|
| key               | 001 |      | on1481472827                                                                       |
| Data source       | 003 |      | OCOLC                                                                              |
| Date/time stamp   | 005 |      | 20251014143246.0                                                                   |
| LCCN              | 010 |      | 2025004419                                                                         |
| Cataloging Source | 040 |      | DLC beng erda cDLC dOCLCO dCHILD dOCLCO dILC dOCLCO dIAH dSDD dTEK dFH dZ#6 dM SON |

Save Add Holdings Modify Holdings 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 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 have the same page count.
- Add page count if missing in the 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.
  - It's **not OK to change the format**, ie e-book to print. For a different format, you need a different record.
- 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**

Call Number and Item Maintenance \* Item Search and Display \* SmartPort \* **Modify Title \***

Modify Title

Strength training for seniors : exercises to rewind the aging process and increase your balance, stability, and stamina / Waehner Paige,

Control Bibliographic MARC Holdings Call Number/Item Bound-with

☐ Shadow title

|            |      |          |      |         |        |          |   |
|------------|------|----------|------|---------|--------|----------|---|
| Rec_Status | c    | Rec_Type | a    | Bib_Lvl | m      | TypeCtrl |   |
| Enc_Lvl    |      | Desc     | i    | Entrd   | 250314 | Dat_Tp   | t |
| Date1      | 2025 | Date2    | 2025 | Ctry    | nyu    | Illus    | a |
| Audience   |      | Repr     | d    | Cont    | bf     | GovtPub  |   |
| ConfPub    | 0    | Festschr | 0    | Indx    | 0      | Fiction  | 0 |
| Biog       |      | Lang     | eng  | Mod_Rec |        | Source   | d |

| .. | Tag | Ind. | Contents                                                                                                                                                   |
|----|-----|------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | 003 |      | OCOLC                                                                                                                                                      |
|    | 005 |      | 20250815140927.0                                                                                                                                           |
|    | 040 |      | YDX beng erda cYDX dOCLCO dJBL dIG#                                                                                                                        |
|    | 020 |      | 1510784896 q(paperback ; qLarge-Print ISBN)                                                                                                                |
|    | 020 |      | 9781510784895 q(paperback ; qLarge-Print ISBN)                                                                                                             |
|    | 020 |      | <del> z9781510758957 q(Original Print ISBN)</del>                                                                                                          |
|    | 020 |      | <del> z9781510758971 q(Ebook ISBN)</del>                                                                                                                   |
|    | 050 | 4    | GV546.6.A35 bW342 2025b                                                                                                                                    |
|    | 082 | 04   | 613.7/130846 223/eng/20250807                                                                                                                              |
|    | 100 | 1    | Waehner, Paige, eauthor.                                                                                                                                   |
|    | 245 | 10   | Strength training for seniors.  h[large print]  bexercises to rewind the aging process and increase your balance, stability, and stamina / cPaige Waehner. |
|    | 250 |      | Large print edition.                                                                                                                                       |
|    | 264 | 1    | New York, NY : bSkyhorse Publishing, c[2025]                                                                                                               |
|    | 264 | 4    | lc©2025                                                                                                                                                    |

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

Call Number and Item Maintenance \* Item Search and Display \* SmartPort \* Modify Title \*

Call Number and Item Maintenance

Search for:

Index: Author

Library: ALL

**Current:** [Dailey, Janet, --- Calder strong --- F DAI --- ID:30291001691475 --- Ctrl#:I978149674...](#)

- o click the Current title-- it should match your item.
- o Click Add Item
- o Enter Item Information (see How to Add an Item: <https://uprlc.org/technical-services-training/uprlc-cataloging-tools/>)
- o Click Save
- o Modify the Call Number to conform to your library's preferred system
- o Click Save