

# MSC Quarterly Webinar: SmartPort & Transferring

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## Summary

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The Montana Shared Catalog (MSC) quarterly webinar covered two primary cataloging workflows in Symphony Workflows: SmartPort for importing bibliographic records and Transferring for moving call numbers and items between records. The focus was on ensuring high-quality catalog records, preventing duplication, and maintaining accurate item and circulation data across the MSC.

### Purpose and Use of SmartPort

SmartPort is used to import bibliographic records from OCLC's WorldCat when no suitable record exists in Workflows. Before using SmartPort, staff should:

- Search the MSC catalog thoroughly (at least two search types, all libraries)
- Apply MSC attachment rules and avoid near-duplicates

SmartPort acts only as a double-check; staff should not rely on it to replace full searching.

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## SmartPort Properties Setup

Correct local property settings are essential, as these control matching behavior and how records load. Key settings include:

- Match points (Title Control Number and Indexed MARC Tag, updated since 2024)
- Call number sources (082 for Dewey, 050 for LC)
- Removing French subject headings
- Keeping “Strip junk tags” enabled
- Limiting results display to no more than 10 due to a known bug

These settings must be verified on each local workstation because changes save locally and override MSC defaults.

## Using SmartPort to Import Records

- Workflow steps include:
  - Log in to SmartPort and connect using the library’s OCLC authorization and password
- Perform multiple searches (ISBN, title, author, OCLC number), using advanced search fields as needed
- Assess record quality using MSC bibliographic record standards, checking key fields such as 040, physical description, summary, and subject headings
- Capture the selected record and edit it if needed, then save

After saving the bib, staff must add their item through Call Number & Item Maintenance—not within SmartPort.

## Common SmartPort Error Messages

Two frequent errors were reviewed:

- “Call number must be unique for create” – indicates the record already exists; staff should close without saving, search by the title control number, and attach an item.
- “Call number already exists” – solved by entering AUTO as the call number during import.

MSC's Knowledge Base (KB) includes detailed workflows for resolving both.

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## Purpose of Transferring

The transfer function prevents duplicate records and preserves circulation history and local settings. Staff should transfer when:

- There is a better bibliographic record available
- Items were attached to an incorrect format record (e.g., print book attached to audiobook record)
- Items reside on long-standing brief records when a full record exists
- Duplicate call numbers exist within a bib and need consolidation

Transfers cannot be completed if items are in transit or if another library's records are involved (unless the user has super cataloger permissions).

## Transfer Wizard Properties & Examples

Key property:

“Allow transfer of all existing call numbers and items in a title” must be checked.

- Examples demonstrated in the webinar included:
  - Moving an item from an incorrect record (e.g., wrong format) to the correct bib record
- Replacing a brief record by transferring items to a full bib and automatically deleting the empty brief record
- Consolidating multiple identical call numbers under a single call number entry

## Supporting Documentation

The webinar referenced [MSC Knowledge Base articles](#) on:

- Bibliographic record standards
- Copy cataloging
- Searching for cataloging
- Setting SmartPort properties
- Importing records
- Editing records
- Resolving SmartPort errors
- Transferring in Workflows

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## Cataloger Checklist

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### Before Using SmartPort

- Search the MSC catalog at least two different ways (title, author, ISBN).
- Ensure the search is set to All Libraries.
- Review MSC attachment rules to confirm whether an existing record is acceptable.
- Verify the record matches the item's format, language, and edition.
- Confirm that no better record already exists.

### SmartPort Setup and Preparation

- Check SmartPort properties on your workstation.
- Verify match points, call number source, and that "strip junk tags" is set to Yes.
- Ensure French subject headings are set to be removed.
- Keep the results limit between 5 and 10.
- Have OCLC authorization and password available.

### Using SmartPort

- Connect to the OCLC database using correct credentials.
- Perform multiple searches (ISBN, title, author, OCLC number).
- Use additional limiting fields such as format codes and language codes.
- Review record quality using MSC bibliographic record standards.
- Choose the strongest, most complete record available.
- Capture the record.
- Make any needed bib-level edits.
- Save the record.

### After Importing a Record

- Open Call Number and Item Maintenance.
- Add an item (do not add a new call number if one was created during import).
- Verify call number details and adjust based on local practices.
- Add barcode, price, item type, and required local fields.
- Save the item.

### Handling SmartPort Errors

- If "Call number must be unique for create" appears, close without saving and search by Title Control Number.
- If "Call number already exists" appears, enter AUTO as the call number.
- Refer to MSC Knowledge Base articles for step-by-step error guidance.

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## Transferring Records

- Transfer when a better bibliographic record exists.
- Transfer if an item was attached to the wrong format record.
- Transfer items from brief records to full records.
- Consolidate duplicate call numbers under a single call number.
- Ensure the item is not in transit before transferring.
- Confirm you have permission or super cataloger rights if other libraries' items are involved.
- Mark the correct call number or item as "retain for transfer."
- Transfer and verify that old empty records are removed.

## General Best Practices

- Refer to MSC Knowledge Base articles as needed.
- Choose the best-quality bibliographic record available.
- Request help if you cannot locate an imported record (keyword search often works before the browse index updates).
- Maintain system-wide record quality in addition to meeting local needs.