

# PINES Catalogers: Definitions and Requirements

There are three types of catalogers in PINES: Cataloging Coordinator (CatCoord), Cat1, and Cat2. There is no limit to the number of Cat1 or Cat2 catalogers a library system can have; however, a system must have at least one Cat1 cataloger and only one CatCoord (which can be the same person).

## CatCoord

The Cataloging Coordinator (**CatCoord**) supports system cataloging staff by creating workstations, running reports, and creating system and branch shelving locations. CatCoords are the main library system contact for cataloging and should be the person, along with the director, that is responsible for cataloging quality for the system, whether in-house or vendor. The coordinator also conducts or oversees all training for new system Cat2 catalogers, or designates a system Cat1 to do so.

Designated by the library system director, there is one CatCoord per system who should be trained as a Cat1 and be a working cataloger so that they can be readily available to assist any other cataloging staff and provide more efficient access to key functional areas. The PINES team understands that in some systems, the CatCoord will be the sole cataloging staff person. A library system can have multiple Cat1s and Cat2s but only one CatCoord.



The Cat1 training will remain the responsibility of the PINES team and a requirement to receive Cat1 permissions.

In order to be assigned permissions to be a CatCoord, designated Cat1s must complete the **PINES CatCoord Certification**, composed of online tutorials about the maintenance of workstations, shelving/copy locations, and quick reports. All five parts of the course need to be successfully completed to receive certification. After completing the training and taking a short quiz, participants will receive a certificate to show that they have successfully completed the course.



Participants should email their completion certificate to the GPLS Helpdesk, with their director copied on the email, to request assignment of the CatCoord permission group.

Contact PINES cataloging staff for more information about training and certification.

CatCoord logins must be associated with the specific person and can be the personal card of the CatCoord or a secondary card assigned to them for cataloging.

**All PINES CatCoord catalogers should**

- Understand how to register new workstations for themselves and other cataloging staff.
- Understand security concerns for workstation administration and learn the importance of understanding any local naming conventions established by LocalAdmin for their system.
- Understand how to create and maintain shelving locations for their system.
- Understand how to create and maintain reports in the Quick Reports interface. Further reports training would be up to the system directors and local administration staff.
- Create and maintain local Non-cataloged Types.
- Create and maintain local Item Statistical Categories.
- Understand all Cat1 and Cat2 requirements.

## Cat1

A **Cat1** has the highest cataloging authorization to work with bibliographic and holdings records. Cat1 permissions allow a cataloger to import, edit, overlay, merge, and delete bibliographic records and add, edit, transfer, and delete library holdings information. Cat1 status is granted only after mandatory training by the PINES Cataloging Specialist.

If there is a staff change in a PINES library that will leave the library system without a Cat1 cataloger, it is the library director's responsibility to notify the PINES Cataloging Specialist of the change so that training can occur as soon as possible.

### All PINES Cat1 catalogers performing copy cataloging should

- Understand and interpret MARC records.
- Have knowledge of and follow RDA standards.
- Have knowledge of and follow established PINES matching criteria for all major formats (such as books, sound recordings, and video materials).
- Search the PINES bibliographic database efficiently and accurately.
- Use the Z39.50 interface in Evergreen to search OCLC and import and edit matching records.
- Search OCLC using the Connexion Client efficiently and accurately.
- Edit records as needed according to PINES established standards.
- Search WebDewey efficiently to verify and assign call numbers.
- Understand Evergreen cataloging functionality and related circulation and acquisitions functions.
- Use Evergreen transfer functions for transferring holdings from poor or wrong records to better records.
- Merge duplicated records within the PINES database.
- Overlay a poor record, a nonOCLC record, or an Encoding Level (ELvl): K record with a better OCLC record.
- Understand local practices and procedures for assigning call numbers, shelving locations, and other local cataloging decisions.
- Understand all Cat2 requirements.

### All PINES Cat1s performing original cataloging should

- Accurately perform descriptive cataloging according to MARC21, RDA, and PINES standards.
- Accurately perform classification analysis to assign Dewey Decimal Classification numbers.
- Accurately perform subject analysis to assign Library of Congress Subject Headings and genre form

headings.

- Establish name headings (access points) and search the OCLC authority file to confirm authorized forms of those names for use in the bibliographic record.
- Accurately and proficiently search the OCLC authority file for authorized forms of subjects and genre headings.

## Cat2

Catalogers with **Cat2** authorization are restricted to adding, deleting, or editing volume and item information for their library systems. They are expected to report any incomplete records or errors in bibliographic information to their cataloging coordinators for resolution. System cataloging coordinators are responsible for training Cat2s in PINES standards and local practices.

### All PINES Cat2 catalogers performing copy cataloging should

- Understand and interpret MARC records.
- Have knowledge of and follow RDA standards.
- Have knowledge of and follow established PINES matching criteria for all major formats (such as books, sound recordings, and video materials).
- Search PINES efficiently and accurately.
- Search WebDewey efficiently to verify and assign call numbers.
- Understand local practices and procedures for assigning call numbers, shelving locations, and other local cataloging decisions.

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