

# Vendor Requirements for Outsourced Cataloging for PINES Libraries

September 2002; Revised January 2007

1. The vendor must review, understand, and adhere to all current PINES cataloging policies and procedures
2. The vendor must demonstrate proficiency in searching the PINES database, including knowing how to utilize the following elements--and combinations:
  1. Author
  2. Title
  3. Series
  4. Publisher
  5. Year of publication
  6. GMD
  7. ISBN
  8. Title control number
3. The vendor must demonstrate proficiency in matching in-hand items with records found in PINES, as well as matching in-hand items with records found in OCLC (see #7, below).
4. The vendor must demonstrate proficiency in PINES procedures re: adding copies to existing bibliographic records (CAT2 access).
5. The vendor must adhere to local call number practices, as specified by the contracting library system.
6. If the vendor is its client library's OCLC authorization to access OCLC's WorldCat, a signed OCLC Third Party Agreement is required by OCLC.
7. The vendor must demonstrate proficiency in searching the OCLC database, including the Authority File, if needed:
  1. Author
  2. Title
  3. Series
  4. Key words
  5. LC Number
  6. ISBN
  7. OCLC control number
  8. Qualifiers (GMD, year, format, etc.)
8. The vendor must be knowledgeable of when and how to import records from OCLC into the PINES database, through the Z39.50 gateway. This includes being familiar with and utilizing the standard PINES cataloging workflow.
9. The vendor must demonstrate proficiency in editing records--especially CIP records--to full MARC standards.
10. The PINES Cataloging Specialist will review initial vendor records for quality and accuracy; spot checks will be conducted as the vendor adds other records to the database. Continued vendor access to PINES is contingent upon vendor adherence to PINES policies and procedures, including the insistence on quality full MARC records.
11. The vendor must agree that there will be no batch loading of records by the vendor into the database. The contracting library system must also agree not to batchload records produced by the

vendor.

NOTE: Vendor on-site training by PINES staff may be required.

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