Qualifications and Training for PINES Catalogers

Copy Cataloging

Copy cataloging is the process of using and editing, if required, an existing bibliographic record for a work in hand. Editing is restricted to corrections and additions to the information in the record. In PINES, there are two types of copy cataloging. The first type is when CAT1 or CAT2 catalogers discover and use a matching record within the PINES database to attach their library holdings. CAT1 catalogers can edit the bibliographic record for missing or incorrect information, following PINES cataloging specifications. The second type is when a CAT1 cataloger discovers a matching existing record in the OCLC WorldCat (OCLC hereafter) database and imports it into the PINES database. The record can also be edited for missing or incorrect information, preferably in OCLC for those accordingly trained. The CAT1 then attaches library holdings or passes it to a CAT2.

A CAT1 has the highest cataloging authorization to work with bibliographic records at each PINES library system. CAT1 status is granted only after mandatory training by the PINES Cataloging Specialist. If there is a cataloging staff change in a PINES library, it is the library director's responsibility to notify the PINES Cataloging Specialist of the change so that training can be done as soon as possible. Each library system should have a cataloging coordinator that oversees and is responsible for (along with the system director) cataloging for the library, whether in-house or vendor. The coordinator also arranges and conducts or oversees all training for new system (CAT2) catalogers.

Catalogers with CAT2 authorization are restricted to adding, deleting, or editing volume and copy information for their library systems. They are expected to report any incomplete records or errors in bibliographic information on records to their cataloging coordinators for resolution. System cataloging coordinators are responsible for training CAT2s in PINES standards and local practices.

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.
- Edit records as needed according to PINES established standards.
- Search WebDewey efficiently to verify and assign call numbers.
- Use the Transfer functions for transferring holdings from poor or wrong records to better records.
- Merge duplicated records within the PINES database.
- Overlay a poor 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.
- All PINES catalogers should subscribe and stay on the PINES-cataloging list. Please subscribe at

CAT-L -- PINES Cataloging Discussion List.

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.
- All PINES catalogers should subscribe and stay on the PINES-cataloging list. Please subscribe at CAT-L -- PINES Cataloging Discussion List.

Original Cataloging

Original cataloging is the creation of a new bibliographic record to represent the work in hand using national standards for bibliographic control.

Training for original cataloging of monographic resources in OCLC is mandatory for all PINES catalogers except those with recent experience and illustrated proficiency in original cataloging using OCLC software and the WorldCat database. CAT1 copy catalogers wishing to perform original cataloging should arrange for training with the PINES Cataloging Specialist. CAT1 catalogers should have at least six (6) months experience in PINES copy cataloging or a demonstrated competency in copy cataloging, before requesting original cataloging training.

The PINES Cataloging Specialist reserves the right to confirm or test a copy cataloger's competency prior to agreeing to original cataloging training. The Cataloging Specialist may require additional experience or training in copy cataloging for catalogers lacking proficiency.

If a PINES library system without an original cataloger acquires materials needing original cataloging, they should contact the PINES Cataloging Specialist or the PINES and Collaborative Projects Manager for assistance.

Currently, PINES offers original cataloging training for books, sound recordings, and visual material formats, the three dominant formats of resources throughout PINES member library systems. If a system needs to catalog a resource of any other format, the system's head cataloger should ask the PINES Cataloging Specialist for additional training and/or assistance.

After training is completed, the PINES Cataloging Specialist will review original records in OCLC by newly trained original catalogers for quality and accuracy until such time as the cataloger demonstrates proficiency.

All PINES original catalogers 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.
- Accurately and proficiently search the OCLC authority file for authorized forms of subjects and genre 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.

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