



Resource Sharing Alliance NFP
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Core Competencies for Cataloging Staff at RSA Member Libraries

The RSA NFP Board of Directors approved these competencies on August 13, 2015.
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Contents

Introduction	2
RSA Basic Level Cataloger	3
RSA Batch Editing Cataloger	5
RSA OCLC Cataloger	7
Appendix: Bibliography of Cataloging Professional Development.....	9

Introduction

Each Resource Sharing Alliance member library plays an integral role in the development and maintenance of a quality bibliographic database and accurate item-level cataloging. Incorrect cataloging frustrates and confuses users and prevents access to materials, which directly opposes the RSA mission. Accurate cataloging, performed by trained staff at RSA libraries, results in user success finding and obtaining materials.

Individual WorkFlows cataloging logins are issued to staff who catalog in WorkFlows. These logins are configured to allow the functionality that the cataloger and the library supervisor considers appropriate based on the cataloger's ability to meet the core competencies associated with the various cataloging levels. Individual cataloging logins serve two important purposes:

- Ensure each staff member uses a WorkFlows login that reflects the cataloging level (or combination of cataloging levels) that are most appropriate for their needs: basic, collection batch edits, and/or OCLC cataloging. Cataloging staff are encouraged to review this document with their supervisors to determine which levels are appropriate to their cataloging responsibilities.
- Enable staff to access the new browser-based BLUEcloud Cataloging interface, currently in development by SirsiDynix. When RSA releases BLUEcloud Cataloging to member libraries, each cataloger will need to use an individually named login to access the BLUEcloud interface. This login will be associated with their existing WorkFlows cataloging login. BLUEcloud Cataloging is not currently available for RSA libraries, but please watch the RSA listserv for more information as development of this interface progresses, and RSA offers opportunities to test the new interface.

Please note certification (testing) is not a core competency for cataloging staff at RSA libraries.

If you have questions or concerns about these competencies, please contact:

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RSA Basic Level Cataloger

The RSA basic cataloging level involves access to the WorkFlows cataloging module to:

- Catalog books, video recordings, sound recordings, serials, kits, and other formats using OCLC bibliographic records already in WorkFlows.
- Edit existing items either individually or globally in WorkFlows.
- Create brief bibliographic records for items that lack existing matching records in WorkFlows and OCLC (if the library uses OCLC).
- Delete items from WorkFlows, either individually or by scanning item IDs.
- Transfer items from one bibliographic record to another, preserving holds, circulation, and inventory statistics.

A basic cataloger will be able to access these WorkFlows cataloging wizards:

- Call Number and Item Maintenance
- Label Designer
- Item Search and Display
- Check Item Status
- Help
- Print
- Add Title
- Delete Titles, Call Numbers, Items
- Add Item
- Edit Item
- Global Item Modification
- Transfers

Core competencies for a basic cataloger include:

- Employment at a Basic or Full Online RSA library. Please refer to the RSA membership list (<https://goo.gl/9gavne>) for a complete listing of libraries and their corresponding RSA membership levels.
- Completion of basic WorkFlows cataloging training provided by RSA or by a cataloging staff member at the library who has previously participated in basic WorkFlows cataloging training.
- Active subscription to the RSA listserv.
- Attendance at RSA Database Committee meetings in-person or virtually to keep informed of RSA cataloging issues and procedures. If a basic level cataloger is unable to attend an RSA Database Committee meeting, review the meeting recording and notes posted on the RSA Database Committee web page.

RSA also recommends (but does not require) that a basic cataloger:

- Subscribe to the RAILS Technical Services e-mail forum to keep informed of cataloging and technical services trends among RAILS member libraries.
- Complete at least one cataloging course offered by RAILS, the Cataloging Maintenance Center, or by an LTA or MLS program.

- Participate in cataloging professional development opportunities listed in the appendix of this document and announced on the RSA listserv.

The RSA Cataloging and Database Department, in cooperation with the staff member's supervisor at the RSA library, may monitor the work of the basic cataloger. The RSA Cataloging and Database Supervisor will consult with the library supervisor to discuss resolution strategies, including re-training, if the cataloger is unable to fulfill the expectations of the basic cataloging level. The cataloger's WorkFlows login will only be disabled as a strategy of last resort. RSA recognizes each member library must be able to maintain its collection at the basic cataloging level.

RSA Batch Editing Cataloger

The RSA batch editing level involves using the item group editor wizard to modify large numbers of item-level information in WorkFlows, such as (but not limited to) home location, item type, item categories, or price. A batch editing cataloger is able to access the basic WorkFlows cataloging wizards, as well as the item group editor wizard.

Core competencies for a batch editing cataloger include:

- Employment at a Full Online RSA library. Please refer to the RSA membership list (<https://goo.gl/9gavne>) for a complete listing of libraries and their corresponding RSA membership levels.
- Existing staff employed at Basic Online RSA libraries that completed item group editor training prior to the approval of the “RSA Functionality by Membership Level” document (<https://goo.gl/PMJXCX>) by the RSA Board of Directors on May 5, 2016 will be “grandfathered in,” permitted to continue using the item group editor wizard. If those existing staff members who are using the item group editor wizard end their employment at the Basic Online library, that library will share any future batch editing requests with the RSA Help Desk to do on its behalf and will no longer be eligible for item group editor training.
- Prior to WorkFlows item group editor training, staff who are interested in this training should discuss with the RSA Cataloging and Database Supervisor at least three different item batch edits that the library plans to do on its collection to ensure the edits will be able to be accomplished in the item group editor.
- Completion of basic WorkFlows cataloging training provided by RSA or by a cataloging staff member at the library who has previously participated in item group editor training.
- At least six months of experience cataloging in WorkFlows, which can be reconsidered on an individual staff member basis at the discretion of the RSA Cataloging and Database Supervisor in consultation with the cataloger’s supervisor.
- Active subscription to the RSA listserv.
- Attendance at RSA Database Committee meetings in-person or virtually to keep informed of RSA cataloging issues and procedures. If a batch editing cataloger is unable to attend an RSA Database Committee meeting, review the meeting recording and notes posted on the RSA Database Committee web page.

RSA also recommends (but does not require) that a batch editing cataloger:

- Complete BLUEcloud Analytics reports training provided by RSA staff.

The RSA Cataloging and Database Department, in cooperation with the staff member’s supervisor at the RSA library, may monitor the work of the batch editing cataloger. After consultation with the library supervisor, the RSA Cataloging and Database Supervisor may suspend the batch editing cataloger’s WorkFlows login if that cataloger is unable to fulfill the expectations of the batch editing cataloging level. The cataloger will have the opportunity to re-take training on the item group editor in order to reactivate the WorkFlows batch editing login.

If, after three training attempts, the batch editing cataloger is unable to correctly follow procedures, the RSA Cataloging and Database Supervisor, after consultation with the library supervisor, will disable the cataloger's batch editing login. The cataloger will submit any batch editing requests to the RSA Help Desk if no other staff at that library is authorized to use the item group editor.

If at least six months have passed since the disabling of the WorkFlows login, the cataloger may ask to perform collection batch edits again. At that point, the cataloger will participate in item group editor re-training offered by RSA staff or a cataloging staff member at the library who has previously participated in item group editor training. After re-training is complete, the RSA Cataloging and Database Supervisor will consult with the library supervisor before reactivating the cataloger's WorkFlows batch editing login. If the login is reactivated, it can be suspended or disabled again according to the same guidelines discussed above.

RSA OCLC Cataloger

The RSA OCLC cataloging level involves searching OCLC WorldCat via Connexion Brower or Connexion Client to find bibliographic records for items that do not already have matching records in the RSA database, then loading those records into RSA with library-specific call number/item information attached. An OCLC cataloger is able to access the basic WorkFlows cataloging wizards, as well as the MARC Import wizard and the WorkFlows Load Bibliographic Records Report.

Core competencies for an OCLC cataloger include:

- Employment at a Basic or Full Online RSA library. Please refer to the RSA membership list (<https://goo.gl/9gavne>) for a complete listing of libraries and their corresponding RSA membership levels.
- Completion of basic WorkFlows cataloging training provided by RSA staff or by a cataloging staff member at the library who has previously participated in basic WorkFlows cataloging training.
- At least six months of cataloging experience, which can be reconsidered on an individual staff member basis at the discretion of the RSA Cataloging and Database Supervisor in consultation with the cataloger's supervisor.
- Completion of OCLC Connexion Client training modules and the RSA Bibload Workshop. Training may also be provided by a cataloging staff member at the library who has previously participated in OCLC Connexion and bibload training.
- Active subscription to the RSA listserv.
- Attendance at RSA Database Committee meetings in-person or virtually to keep informed of RSA cataloging issues and procedures. If an OCLC cataloger is unable to attend an RSA Database Committee meeting, review the meeting recording and notes posted on the RSA Database Committee web page.

RSA also recommends (but does not require) that an OCLC cataloger:

- Subscribe to the RAILS Technical Services e-mail forum to keep informed of cataloging and technical services trends among RAILS member libraries.
- Complete at least one cataloging course offered by a professional development organization such as RAILS or by an LTA or MLS program.
- Attend professional development events hosted by organizations such as, but not limited to, RAILS, RSA, Cataloging Maintenance Center, or OCLC, to keep informed of cataloging and technical services trends.
- Participate in cataloging professional development opportunities listed in the appendix of this document and announced on the RSA listserv.

The RSA Cataloging and Database Department, in cooperation with the staff member's supervisor at the RSA library, may monitor the work of the OCLC cataloger. After consultation with the library supervisor, the RSA Cataloging and Database Supervisor may suspend the OCLC cataloger's WorkFlows login if that cataloger is unable to fulfill the expectations of the OCLC cataloging level. The cataloger will have the opportunity to re-take training order to reactivate the WorkFlows bibload login.

If, after three training attempts, the OCLC cataloger is unable to correctly follow procedures, the RSA Cataloging and Database Supervisor, after consultation with the library supervisor, will disable the cataloger's WorkFlows login that has bibload authorization. The cataloger will create brief records for items that lack matching records in WorkFlows.

If at least six months have passed since the disabling of the WorkFlows account, the cataloger may ask to perform OCLC cataloging and WorkFlows bibloads again. At that point, the cataloger will participate in re-training offered by RSA staff or a cataloging staff member at the library who has previously participated in OCLC Connexion and bibload training. After re-training is complete, the RSA Cataloging and Database Supervisor will consult with the library supervisor before reactivating the cataloger's WorkFlows bibload login. If the login is reactivated, it can be suspended or disabled again according to the same guidelines discussed above.

Appendix: Bibliography of Cataloging Professional Development

Cataloging staff at RSA member libraries are strongly encouraged to participate in professional development opportunities, such as (but not limited to), those listed below, if they are relevant to their RSA cataloging levels. Professional development is recommended but not required in order to catalog in the RSA database.

Please note:

- The scope of this bibliography is limited to cataloging professional development opportunities that are freely accessible online and self-paced.
- Some opportunities are listed under multiple categories, if applicable to the content.
- This is not a comprehensive list. Please share suggestions for additional free cataloging professional development with the RSA Cataloging and Database Supervisor.
- The access URLs may become invalid in this bibliography. Please report broken URLs to the RSA Help Desk.

Cataloging Principles

Introduction to Technical Services and Catalog Records

Organizer: Idaho Commission for Libraries

<http://libraries.idaho.gov/able5>

Introduction to Subject Headings

Organizer: Idaho Commission for Libraries

<http://libraries.idaho.gov/able6>

Introduction to Dewey Classification

Organizer: Idaho Commission for Libraries

<http://libraries.idaho.gov/able7>

Introduction to MARC Cataloging

Organizer: Idaho Commission for Libraries

<http://libraries.idaho.gov/able8>

Linked Data and BIBFRAME

Beyond MARC: BIBFRAME and the Future of Bibliographic Data

Organizer: RAILS

<https://www.railslibraries.info/ce/archive/104914>

From MARC to BIBFRAME: An Introduction

Organizer: Association for Library Collections & Technical Services

<https://www.youtube.com/watch?v=OQijXJauo8I>

Linked Data for Libraries: What? Why? How?

Organizer: RAILS

<https://www.railslibraries.info/ce/archive/103768>

Linked Data 101: Introduction to Linked Data

Organizer: SirsiDynix

<http://go.sirsiDynix.com/Linked-Data-101-Introduction-to-Linked-Data-On-Demand.html>

Linked Data 201: How It Works

Organizer: SirsiDynix

<http://go.sirsiDynix.com/Linked-Data-201-How-It-Works-On-Demand.html>

Linked Data 301: A Breakdown of BIBFRAME

Organizer: SirsiDynix

<http://go.sirsiDynix.com/Linked-Data-301-A-Breakdown-of-BIBFRAME-On-Demand-SD-Webinar-LP.html>

Linked Data 401: In Your Library

Organizer: SirsiDynix

<http://go.sirsiDynix.com/Linked-Data-401-In-Your-Library-On-Demand-SD-Webinar-LP.html>

Linked Data 499: Your Action Plan

Organizer: SirsiDynix

<http://go.sirsiDynix.com/Linked-Data-499-Your-Action-Plan-On-Demand-SD-Webinar-LP.html>

MARC

Introduction to MARC Cataloging
Organizer: Idaho Commission for Libraries
<http://libraries.idaho.gov/able8>

MARC for Copy Cats. Part 1, Background Material
Organizer: The MARC of Quality
<http://www.marcofquality.com/webinars/webjcc.html>

MARC21 in Your Library. Part 1, MARC and Bibliographic Information: The Underlying Fundamentals
Organizer: The MARC of Quality
<http://www.marcofquality.com/webinars/webm21.html>

RDA/MARC for Copy Cats. Part 1, Background Material
Organizer: The MARC of Quality
<http://www.marcofquality.com/presentations/RMCC/RMCC.1.1.Background/player.html>

OCLC Connexion

Learning Paths for Connexion Browser
Organizer: OCLC
<http://www.oclc.org/support/training/portfolios/cataloging-and-metadata/connexion-browser/learning-paths.en.html>

Learning Paths for Connexion Client
Organizer: OCLC
<http://www.oclc.org/support/training/portfolios/cataloging-and-metadata/connexion-client/learning-paths.en.html>

BLUEcloud Visibility

BLUEcloud Visibility: The Future of Library Data
Organizer: SirsiDynix
<http://go.sirsidynix.com/BLUEcloud-Visibility-The-Future-of-Library-Data-On-Demand.html>

BLUEcloud Visibility Overview
Organizer: SirsiDynix
<http://go.sirsidynix.com/BLUEcloud-Visibility-Overview-September-On-Demand.html>

Visible Success: What Your Library Can Do to Make the Most of BLUEcloud Visibility
Organizer: SirsiDynix
<http://go.sirsidynix.com/Visible-Success-What-Your-Library-Can-Do-To-Make-the-Most-of-BLUEcloud-Visibility-On-Demand-Reg.html>

Resource Description & Access (RDA)

Best Practices for RDA in MARC21

Organizer: RAILS

<https://www.railslibraries.info/ce/archive/95629>

Introduction to RDA

Organizer: Association for Library Collections & Technical Services

<https://www.youtube.com/watch?v=rZ7ePkTc3lg&index=8&list=PL1AAFB573158DC4A1>

Preparing Copy Catalogers for RDA

Organizer: Association for Library Collections & Technical Services

https://www.youtube.com/watch?v=T_J9CaqwPew&index=10&list=PL1AAFB573158DC4A1

RDA: Benefits for Users and Catalogers

Organizer: Association for Library Collections & Technical Services

<https://www.youtube.com/watch?v=NncsQzf8LQU&index=7&list=PL1AAFB573158DC4A1>

RDA for Copy Catalogers: The Basics

Organizer: Association for Library Collections & Technical Services

<https://www.youtube.com/watch?v=3z2RR6JaA7c&index=33&list=PL1AAFB573158DC4A1>

RDA/MARC for Copy Cats. Part 1, Background Material

Organizer: The MARC of Quality

<http://www.marcofquality.com/presentations/RMCC/RMCC.1.1.Background/player.html>

Rudimentary RDA. Part 1, What RDA is, When it Will Happen, and Why We Need it

Organizer: The MARC of Quality

<http://www.marcofquality.com/webinars/webrrda.html>