



Bibliographic Database Standards

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I. Purpose

The purpose of the Bibliographic Database Standards is to facilitate a high-quality bibliographic database for the RSA membership and the users they serve. RSA members must adhere to these standards according to the [Bibliographic Database Policy](#).

Each RSA library plays an integral role in the development and maintenance of the shared bibliographic database. Outlined in the [RSA Expectations & Responsibilities](#), every library helps ensure that the RSA core principles of convenience, discoverability, and reciprocity, are fulfilled.

Incorrect cataloging results in circulation and hold problems, inaccurate collection reports, frustration for patrons and library staff, hindered discoverability in the RSA database and online catalog, and obstructed access to materials. All of these issues directly oppose convenience, discoverability, and reciprocity.

Accurate and complete cataloging at the bibliographic, call number, and item levels, performed by trained staff at RSA libraries and the RSA Bibliographic Services Department, results in patrons and library staff successfully finding materials, checking them out, and placing them on hold. Discoverability and convenient access to library materials are vital to effective resource sharing and a positive patron experience.

II. Cataloging Standards

RSA adheres to the MARC (MACHine Readable Cataloging) format, OCLC Bibliographic Formats and Standards, Resource Description and Access (RDA), and Library of Congress – Program for Cooperative Cataloging Policy Statements.

The RSA Bibliographic Services Department performs full level cataloging on the official WorldCat record, not the copy of the record in the OCLC save file or the RSA database. WorldCat level cataloging allows other OCLC member libraries to use the record, avoiding the need for each OCLC member to edit, upgrade, or create the record themselves.

III. Advanced Cataloging

RSA member libraries must adhere to the same cataloging standards as the RSA Bibliographic Services Department if they are editing, upgrading, deriving, or creating new original OCLC records. However, there is no requirement or expectation from RSA for member libraries to catalog at this advanced level.

Member library staff who seek to catalog at an advanced level should first receive permission from their supervisor or Director to catalog at this level. Participation in RAILS and Cataloging Maintenance Center (CMC) coursework is helpful for those cataloging at an advanced level. Attending cataloging webinars, conferences, and RSA Cataloging Chats are also recommended to stay informed of current cataloging practices.

RSA member libraries that catalog at an advanced level must take care not to edit an existing OCLC record to match their item when that record does not initially match. A “close enough” record that does not match must not be edited to fit the library’s item. In this instance, a new or different OCLC record is necessary to catalog the item.

A brief record can be created in the RSA database if library staff lack the time or expertise to create a new OCLC record. Refer to the [Creating a Brief Record Guide](#) for more information.

IV. Controlled Vocabularies

RSA uses several controlled vocabularies when cataloging, particularly when Library of Congress Subject Headings and Library of Congress Genre/Form Terms do not effectively describe the item. Using a variety of controlled vocabularies improves discoverability in the RSA database and online catalog. Headings from the controlled vocabularies listed below are entered on the official WorldCat record whenever possible.

Alternative subject headings for disability, accessibility, and immigration topics are used when appropriate. These headings originate from the [Disability and Accessibility Subject Headings Toolkit](#) and the [Immigration Subject Headings Toolkit](#) created by working groups

of the Diversity, Equity, and Inclusion (DEI) in Metadata Networking Group of Illinois. The headings recommended by this group are only used on bibliographic records at the local level in the RSA database because they have not been adopted by the wider OCLC cataloging community.

Examples:

690 04 People with depression.

690 04 People with a developmental disability.

690 04 Immigration detention centers.

690 04 Undocumented immigration.

[Getty's Art & Architecture Thesaurus](#)

Examples:

655 _7 Cake pans. \$2 aat

655 _7 Music posters. \$2 aat

GSAFD (Guidelines on Subject Access to Individual Works of Fiction, Drama, Etc.)

This vocabulary is no longer online but available in print.

Examples:

655 _7 Mystery fiction. \$2 gsafd

655 _7 Adventure television programs. \$2 gsafd

[Homosaurus Vocabulary Terms](#)

On May 17, 2024, the RSA NFP Database Committee forwarded to the RSA Board of Directors a proposal to use the Homosaurus controlled vocabulary when cataloging. The RSA Board of Directors approved the [Homosaurus Cataloging Policy](#) on August 1, 2024. Homosaurus is an international linked data vocabulary of Lesbian, Gay, Bisexual, Transgender, and Queer (LGBTQ+) terms that can be used as subject and genre headings.

Examples:

650 _7 LGBTQ+ victims of bullying. \$2 homoit

650 _7 Non-binary parents. \$2 homoit

[Library of Congress Genre/Form Terms](#)

Examples:

655 _7 Science fiction. \$2 lcgft

655 _7 Jigsaw puzzles. \$2 lcgft

[Library of Congress Subject Headings](#)

Examples:

600 10 Keller, Helen, \$d 1880-1968 \$v Juvenile literature.

650 _0 Cats \$v Juvenile fiction.

651 _0 Madison Avenue (New York, N.Y.) \$v Drama.

[OLAC Video Game Genre Vocabulary](#)

Examples:

655 _7 Adventure video games. \$2 olacvgtt

655 _7 Educational video games. \$2 olacvgtt

[Thesaurus for Graphic Materials](#)

Examples:

655 _7 Graphic novels. \$2 gmgpc

655 _7 Comic books. \$2 gmgpc

[University of North Texas Digital Library Genre Terms for Tabletop Games](#)

Examples:

655 _7 Cooperative games. \$2 gttg

655 _7 Board games. \$2 gttg

Retain all subject and genre headings regardless of the source of the headings and even if they appear as “unauthorized” in WorkFlows.

Examples:

650 _2 Drug Therapy|xnursing.|0(DNLM)D004358Q000451|?UNAUTHORIZED

655 _7 Automobile racing.|2fast|0(OCOLC)fst00823132|?UNAUTHORIZED

V. Bibliographic Records

OCLC WorldCat is the primary source of bibliographic records in the RSA database. RSA batch updates member library holdings monthly in OCLC.

RSA member libraries are required to use OCLC records with the fullest level of bibliographic description that matches their item to enable optimal discoverability in the RSA database and online catalog. Refer to the [matching documentation](#) on the RSA support site for more information about specific fields to compare between the bibliographic record and the item in hand.

If there is no matching record for the library’s item in the RSA database or OCLC (if the library uses Connexion Client or Record Manager), the library will create a brief record in the RSA database for the RSA Bibliographic Services department to eventually upgrade to an OCLC record. Refer to the [Creating a Brief Record Guide](#) for instructions on how to enter a brief record.

Prefer Library of Congress Bibliographic Records

Whenever possible, RSA libraries should use an OCLC record created by the Library of Congress that contains DLC in its 040 field. Refer to the [Prefer Library of Congress Records Cheat Sheet](#) for a screenshot of an example Library of Congress record.

In the case of duplicate OCLC records, either in the RSA database or OCLC, that seem to describe the same item based on the core description (author, title, edition statement if present, publication information, and physical description), and one of the duplicate records is assigned an encoding level value of 8, and the other duplicate record is assigned an encoding level value other than 8, do the following:

Check the 040 field of the duplicate record assigned the encoding level 8. If this record contains DLC in its 040 field, the record was created by the Library of Congress and is the best record to use to catalog the item.

If the other duplicate record is assigned an encoding level value besides 8, yet it lacks DLC in the 040 field, do not use the record to catalog your item.

If there are multiple DLC records that describe the same item, choose the record with the most libraries attached to it in the RSA database or OCLC. Report the duplicate records to the RSA Help Desk.

Use English Language Bibliographic Records

Only use English language bibliographic records. Check the 040 field on the record.

For a bibliographic record written in English that describes an English language item, the 040 |b will either be “eng,” or 040 |b will be omitted entirely. The “Lang” code in the fixed fields at the top of the record will be “eng” to indicate the language of the item.

For a bibliographic record written in English that describes a world language item, such as Spanish, the 040 |b will either be “eng,” or 040 |b will be omitted entirely. The “Lang” code in the fixed fields at the top of the record will be “spa” to indicate the language of the item.

If you are unable to find an English language record that matches your item, [create a brief record](#) in the RSA database.

Use Annual Bibliographic Records for Selected Magazines

RSA creates annual bibliographic records for magazines that initially had at least 800 library issues attached to their comprehensive records in the RSA database. The comprehensive records describe all the publication years of that magazine, while the annual records describe issues of that magazine only published during a single year.

For a list of the specific magazine titles with annual records for the current year, refer to the [Cataloging Magazines in WorkFlows Guide](#). Excluding libraries that use the Serial Control module in the RSA database, libraries are required to use the annual records to catalog their magazine issues. Using annual records eases cataloging and improves search and

display in both the RSA database and the online catalog.

Multiple ISBNs on a Bibliographic Record

If ISBNs for hardcover, paperback, and electronic (e-book) editions all appear on a print book, the ISBNs for all of those editions can appear on the record in the RSA database or OCLC.

If the ISBN describes an edition other than that described by the record, subfield \$z should precede the ISBN, and qualifying information should be provided.

For example, for a print book with an e-book ISBN on its title page verso:

020 0198702345 \$q (pbk.)

020 \$z 9781100216249 \$q (electronic bk.)

A trade paperback may be cataloged on a hardcover record, and a hardcover may be cataloged on a trade paperback record if the record matches the book based on the author, title, publication information, pagination, and physical dimensions.

Hardcover and trade paperbacks should never be cataloged on records that describe mass market paperbacks due to differences in pagination and physical dimensions.

Musical Composers versus Performers on RDA Records

Under Resource Description and Access (RDA) cataloging rules, only composers of musical works should appear as the creator, in the 100 field on the bibliographic record, while performers who have no composing role should appear in the variant access points in the 700 fields.

Neither RDA nor RSA determine how musical recordings should be classified or shelved in the library collection. RSA recommends considering the container, as well as the musical work's physical carrier (compact disc, cassette tape, etc.) when assigning a call number. The performer should be prominently mentioned on the container and physical carrier.

Prefer Separate Blu-ray and DVD Records

Prefer records that describe each disc separately if you purchase Blu-ray/DVD combination packages, and your library will split the package, barcoding and circulating each disc separately.

Check the 347 (digital file characteristics) and 538 (technical details) fields to ensure the Blu-ray or DVD format described by the OCLC record matches that of your item. Not all OCLC records contain both fields.

Examples:

347 __ |bBlu-ray

538 __ Blu-ray; region A; 1080p High Definition; wide screen (2.39:1 & 1.90:1); Dolby Atmos, Dolby Digital Plus 7.1 (French or Spanish), Dolby Digital 2.0 (described video); requires Blu-ray player.

Prefer Comprehensive Records for Complete Seasons of TV Series

Prefer a single comprehensive record that describes a complete season of a TV series, with the multi-disc set assigned a single item ID, rather than each disc assigned its own item ID. The practice of assigning each disc its own item ID risks placement of holds on the incorrect disc and frustration for both library staff and patrons.

Prefer Analytical Records for Graphic Novels

Prefer analytical records that describe each title separately in a graphic novel series, rather than a single comprehensive record that describes the entire graphic novel series.

Analytical records provide library staff and patrons with greater detail about the graphic novel, improve discoverability in the RSA database and online catalog, and prevent the wrong graphic novel in the series from filling a hold.

VI. MARC Record Exports

A library that requests an export of their bibliographic records from the RSA database in the Machine Readable Catalog (MARC) format for use in third-party products, such as collection analysis tools, must currently belong to OCLC. The library must also serve as the liaison between the third-party vendor and RSA. RSA will not work directly with the vendor.

VII. Call Numbers

RSA member libraries are required to enter accurate, consistent call numbers, enabling collocation of similar items together on the shelf and optimal discoverability in the RSA database and online catalog.

Consistent Call Number Prefixes

Check call number prefixes to ensure they are entered consistently according to your library's local practices.

Examples:

- “FIC” rather than the “F” prefix for fiction call numbers (may vary depending on your local practices)
- Dewey Decimal Classification numbers with consistent lengths and author names

XX Auto-Generated Call Numbers

Ensure no call numbers for permanent items in your collection use the auto generated XX prefix, followed by a variable number of digits. Libraries are encouraged to submit a [report request](#) to monitor for these call numbers in need of correction.

Call Numbers with Hyphenated Last Names

In call numbers that use hyphenated last names of authors, ensure those call numbers are entered under the first portion of the hyphenated name. For example, for a title by Lori Rader-Day, the call number would be entered under Rader (e.g., RAD).

Call Numbers with Compound Last Names

If an author has two names (also called a “compound name”) that appear to be last names, but they are not hyphenated, you will enter the call number under the final name. For example, for a title by Arthur Conan Doyle, the call number would be entered under Doyle (e.g., DOY).

Magazine Call Numbers

To ensure magazine holdings sort chronologically by date and allow patrons to place holds on specific issues in the online catalog, RSA recommends magazine call numbers use the prefix MAG, followed by the |Z (“pipe Z”) analytic, and the issue date. Refer to the [Cataloging Magazines in WorkFlows Guide](#) for more information, including example magazine call numbers.

Call Numbers for Multi-Piece Items

RSA strongly recommends cataloging each item from a multi-volume set or a multi-disc set on its own bibliographic record that describes only that particular item (e.g., only volume 20), rather than cataloging the item on a bibliographic record that describes the multi-piece set as a whole (e.g., all 20 volumes attached to a bibliographic record that describes the complete 20 volume set).

If a library prefers to catalog multiple items on a bibliographic record that describes the multi-piece set as a whole, the library must correctly enter call numbers with the |Z analytic in them. The |Z allows patrons to place holds on individual items from a multi-piece set in the RSA online catalog.

If the |Z is not used in the call number, the patron will only be able to place a title-level hold on the multi-piece set in the online catalog. The first available item attached to the record will fill the hold, and the patron will likely not receive their desired item. For more information, refer to the [Creating Call Numbers for Multi-Piece Items](#) document.

VIII. Items

RSA member libraries are required to enter accurate and complete item-level information. This information is critical because it allows users to understand the item's format and shelving location, enabling discovery in both the online catalog and the physical collection. To facilitate resource sharing to the fullest extent possible, RSA member libraries are required to enter all items permanent to their collections into the RSA database.

Replacement Items

When replacing an item due to damage, missing, lost, or any other reason, the replacement item must be cataloged as a brand new item in the RSA database assigned a brand new item ID. Libraries must not reuse the existing item record by editing the item ID to that of the new item. Doing so can cause trouble in the database when a history log is run of that item.

Libraries are encouraged to use the staff note on the new item's record to make note of circulation statistics for the original copy if that information is helpful for the library to retain. Libraries must not manually edit the total number of charges on the database screen, which can cause trouble in the automatic counters in the database.

If the item ID for an existing item needs to be replaced, such as in the event that the original item ID falls off or becomes damaged, the library does not need to re-catalog the item in the RSA database as a brand-new item. The library can edit the original item ID to the new one on the existing item record.

Prohibited Items

The [Prohibited Items Policy](#), approved and adopted by the RSA Board of Directors on September 4, 2025, outlines specific types of items that shall not be cataloged, circulated, or interlibrary loaned in the RSA database due to the legal liability for both the library and RSA. Prohibited Items encountered in the RSA database must be promptly reported to RSA to determine next steps. Refer to the [Prohibited Items Procedure](#) for more information on what to do if one of these items is encountered in the RSA database.

New Materials Item Types

On May 10, 2022, the RSA Board of Directors approved the [New Materials Item Types Policy](#) that retired 20 legacy new item types and replaced them with a standardized, more focused set of item types for new materials. This policy also establishes maximum time limits for how long an item may be considered new by a public versus a school library. RSA uses a batch editing process to ensure items do not remain new longer than is permitted. Refer to the [New Materials Item Types Standard](#) for more information.

Library Bound Items

When searching for a matching record for a library bound item, use the paperback ISBN that appears on the title page verso if it differs from the ISBN printed on the back cover. Use the record that describes the paperback if it matches the library bound item. Libraries are strongly encouraged to report the library binding ISBN to RSA to add to the paperback record, increasing discoverability and reducing duplicate records. Refer to the [Library Bound Items Best Practices](#) for more information.

Withdrawing Items

To ensure accurate holdings, a library must delete or discard an item from the RSA database when it is withdrawn from the collection. Discard is the preferred method for removing items because the discard process generates deletion statistics. For more information, refer to the [WorkFlows Discard User Procedure](#).

RSA libraries are required to remove certain types of item records from the RSA database after a designated amount of time. Refer to the [Database Records Deletion Policy](#) for more information about the affected item records and the timetable for removing them. Libraries can contact RSA for assistance with the removal of the item records.

IX. Item Barcodes

RSA strongly recommends purchasing item barcodes from [ID Label](#). All RSA libraries must use item barcodes that meet Code 39, Mod-10 specifications to work correctly in the RSA database.

A library that is considering purchasing item barcodes from a vendor other than ID Label must contact the RSA Help Desk for more information about barcode specifications.

X. Cataloging Electronic Resources

Electronic resources (e-resources) may not be cataloged in the RSA database using MARC records. Exceptions include government documents, local history, genealogy, and special collections. E-resource records are problematic for several reasons:

- The placeholder call numbers and items attached to the e-resource records to load them into the RSA database often confuse users. The placeholders do not display the actual availability of the e-resource and may make it seem like more copies of that e-resource are available than the library's license actually permits. Many e-resource licenses only allow a restricted number of users to simultaneously access the e-resource.

- The access link on the e-resource record does not necessarily link directly to the login web page to download the content. The access link may navigate the user to a generic “landing page” that lists all of the e-content available from that vendor or to a third-party website from which the user must download an app to access the content.
- Maintaining functional access links and deleting the MARC records from the RSA database for de-licensed e-resources has been difficult for RSA to track for those e-resource records previously loaded. In many cases RSA is unaware an access link needs updated, or the title is no longer accessible until a patron reports it to the library.
- The bibliographic quality of e-resource MARC records is often questionable because they originate from vendors. The records typically need significant, time-intensive batch editing by the RSA Bibliographic Services Department prior to loading into the RSA database.
- Cataloging e-resources counts toward the total number of allowed MARC records in the RSA database under the RSA/SirsiDynix contract. RSA must prioritize using records for physical library collections.

XI. Cataloging Parameters

Libraries are required to assign cataloging parameters (or codes) to each item cataloged in the RSA database. In the context of the current SirsiDynix Symphony WorkFlows database, home location, item type, and item categories 1-3 are required to be assigned to each item. Using item categories 4-5 is strongly encouraged but optional. The OCLC EXCLUDE item category 6 is assigned if the library’s holding for that item should not be updated in OCLC WorldCat, preventing WorldShare interlibrary loan requests.

RSA recommends that a library customize the home location, item type, and item category 4-5 menus in the RSA database to only those codes it uses to ensure accurate cataloging.

Complete lists of cataloging parameters are available on the [RSA support site](#). Some parameters are considered [mandatory](#) and must remain in the cataloging menus even if they are customized.

Cataloging parameters play a critical role displaying the item not just in the RSA database but also in the online catalog. For a visual of how cataloging parameters affect display in the online catalog, refer to this [cheat sheet](#).

XII. Reporting Cataloging Issues

Libraries are encouraged to report cataloging issues, such as (but not limited to) items

cataloged on the wrong records and duplicate records, to RSA for resolution in the RSA database and OCLC WorldCat (the latter if applicable). Refer to the [Reporting Cataloging Issues to RSA Procedure](#) for more information.

XIII. Database Maintenance

The RSA Bibliographic Services Department regularly conducts database maintenance to enhance the quality of the shared database and improve discoverability for both library staff and patrons. Member libraries are encouraged to conduct database maintenance as well. For more information about database cleanup projects, refer to the [Database Maintenance Reports Cheat Sheet](#).

XIV. Cataloging Training

Library staff who catalog in the RSA database are required to complete RSA-provided training or participate in internal cataloging training at their library.

Cataloging courses offered by the Reaching Across Illinois Library System (RAILS), the Cataloging Maintenance Center (CMC), the LACONI Technical Services Section, and other organizations are helpful supplements to RSA cataloging training, though participation is not required.

Library staff who participate in supplemental training are encouraged to contact the RSA Help Desk if they have questions about how the content of the training applies to RSA cataloging practices.

XV. Cataloging Site Visits

The RSA Bibliographic Services Department conducts routine, in-person cataloging site visits at member libraries. Participation in these visits is required. The cataloging site visit is an opportunity for libraries and RSA staff to connect, discuss helpful cataloging topics, check for potential database maintenance, and answer any questions. A library may also request a cataloging site visit at any time using this [online form](#).

XVI. Individual Cataloging Authorizations

Each library staff member who catalogs in the RSA database is required to use an individually named authorization. Each authorization is configured to include the functionality that is necessary for that staff member based on their training, experience, and responsibilities. Library staff must only use their own authorization to catalog. The individual cataloging authorization may be used by other staff, however, for circulation and hold tasks.

While RSA does not closely monitor the activity of individual cataloging authorizations, RSA

will reach out to a library staff member if RSA notices repeated cataloging errors. RSA will work with the staff member to ensure they understand cataloging procedures.

The cataloging authorization levels in the RSA database include basic, batch editing, and OCLC cataloger. A breakdown of each level is below, written in the context of SirsiDynix Symphony WorkFlows, the database currently used by RSA.

RSA Basic Level Cataloger

The RSA basic cataloging level includes the following functionality:

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

Requirements for a basic cataloger include:

- Completion of basic WorkFlows cataloging training provided by RSA or by another staff member at the library who has previously participated in this training.
- Active subscription to the RSA Cataloging email forum.

RSA Batch Editing Cataloger

The RSA batch editing level involves using the WorkFlows Item Group Editor wizard to modify large amounts of item-level information, 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 in addition to the Item Group Editor.

Requirements for a batch editing cataloger include:

- Completion of basic WorkFlows cataloging training provided by RSA or by another staff member at the library who has previously participated in this 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 Bibliographic Services Manager in consultation with the library staff member's supervisor.
- Completion of WorkFlows Item Group Editor training provided by RSA or by another staff member at the library who has previously participated in this training.
- Active subscription to the RSA Cataloging email forum.

RSA also recommends that a batch editing cataloger complete RSA BLUEcloud Analytics reports training.

RSA OCLC Cataloger

The RSA OCLC cataloging level involves searching OCLC WorldCat via Record Manager or Connexion Client to find bibliographic records for items that do not have existing matching records in WorkFlows. The cataloger loads those records into WorkFlows with library-specific call number/item information attached to them, making the items visible in both WorkFlows and the RSA online catalog.

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.

Requirements for an OCLC cataloger include:

- Completion of basic WorkFlows cataloging training provided by RSA or by another staff member at the library who has previously participated in this 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 Bibliographic Services Manager in consultation with the library staff member's supervisor.
- Completion of OCLC Connexion Client training modules and the RSA Bibload Workshop. Training may also be provided by another staff member at the library who has previously participated in this training.
- Active subscription to the RSA Cataloging email forum.