**Certification requirements for new barcoders and catalogers**
**SHARE Bibliographic and Cataloging Standards Committee**

Library directors must contact the SHARE Bibliographic Services department manager to identify staff members who will be catalogers and barcoders and require initial training.

**Levels**

**Barcoder:** Has the knowledge/training to search the local database to identify a matching record. If a matching record is found, attaches item/holding record. If a matching record is not found, item is given/sent to a cataloger. This level may not edit bibliographic records.
**Required training**: Basic understanding of MARC records
Searching and matching in the local database
Creating, editing, and deleting item/holding records in the local database

These classes must be completed within the first three months of training. Once the initial training is done, there are no further ongoing training requirements.

**Cataloger:** Has the knowledge/training to perform copy or original cataloging in addition to searching for a matching record and attaching an item/holding record. This level may bring records into the local database from OCLC and may edit bibliographic records in the local database in accordance with SHARE cataloging policies. This level may also edit OCLC master records to include upgrading less than full-level records via the OCLC Expert Community functionality. SHARE catalogers are not required to do original cataloging, but may create original records if desired.

**Required training**:
1.MARC coding
2.Searching and matching in the local database
3.Creating, editing, and deleting item/holding records in the local database
Steps 1-3 must be completed within the first three months of training
4.Monograph cataloging
5.OCLC Connexion client modules:

> Module 1: WorldCat, MARC, and client basics
> Module 2: Basic bibliographic searching
> Module 3: Basic editing and record processing
> Module 6: Editing master records
> Module 7: Advanced bibliographic searching

6. Cataloging in Polaris-- editing and deleting bibliographic records, creating on-order records.

Will also train on the use of MARC Report if desired. Note: MARC Report software is a fee-based service.

7. Authority control and subject analysis

8. OCLC Connexion client module 9: Authority control

9. Cataloging classes for sound recordings and videorecordings

10. DDC or LC classification—whichever the library uses

11. Cataloging in the local database—importing records, merging records

12. Catalogers who desire to do original cataloging must complete OCLC Connexion client module 8: Original cataloging

Optional training will be available as needed for other formats (kits, realia, serials, maps, etc.)

Staff members will be given limited cataloging permissions in Polaris when they have completed the first five required steps above. At that time they'll be given training on cataloging in Polaris (step 6).

New catalogers will not have import permission until the completion of step 10. Until that time catalogers will submit import files to SHARE staff for review and import.

In addition to the initial classes, catalogers must demonstrate proficiency. This will be done in an in-person session with SHARE Bibliographic Services staff.

Attendance at classes is not required for staff members who have previous cataloging experience or who have completed a cataloging course. SHARE Bib Services staff will work with these staff members on local cataloging standards and practices.

Once the initial training requirements have been completed, catalogers must meet the ongoing requirement of 15 hours of cataloging CE each fiscal year (July 1 – June 30).

**Additional requirements**

Libraries are required to maintain access to the Anglo-American Cataloguing Rules (AACR2). It is optional for libraries to have a subscription to the RDA Toolkit, or to purchase the print version. It is recommended that libraries maintain a license for the MARC Report software, which is useful for identifying errors in MARC coding.

SHARE cataloging standards require that cataloging libraries also maintain an OCLC membership.

**Other**

Barcoding A libraries may become cataloging libraries the next fiscal year after a cataloger is certified. Barcoding B libraries may change to a cataloging library at any time after completion of step 6.