



Certification requirements for barcoders and catalogers (Rev. 09/2022)

Library directors must contact the SHARE Bibliographic Services Manager to request training for member library staff to obtain cataloging and barcoding certification.

The SHARE Bibliographic Services manager will provide the appropriate form for the director and staff member(s) to sign to ensure that all parties understand the process and time involved for obtaining barcoding or cataloging certifications.

Levels

Barcode:

Has the knowledge/training to search the local database to identify a matching record. If a matching record is found, attaches item record. If a matching record is not found, item is given/sent to a cataloger. This level may not edit bibliographic records.

Initial required training:

- Barcoding I: Searching and Matching (searching the local database for a matching bibliographic record)
- Barcoding II: Item Records (creating, editing, and deleting item records in the local database)

Classes will be conducted by a SHARE staff member and may be either in-person or online via live training course or on the Moodle training platform.

Certification renewal training:

Barcoders are required to take Barcoding Refresher training every two years. A barcoders certification renewal date is based on the date they are assigned barcoding permissions or the last time they took Barcoding Refresher training, whichever is latest. The Barcoding Refresher course is offered on the Moodle training platform

Barcoding Refresher training cannot be taken more than 3 months prior to the barcoder's biannual certification renewal date.

Cataloger:

Has the knowledge/training to perform copy or original cataloging in addition to searching for a matching record and attaching an item 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. Barcoding I--Searching and Matching (searching the local database for a matching bibliographic record)
2. Barcoding II—Item Records (creating, editing, and deleting item records in the local database)
3. OCLC Connexion client online module 1: [WorldCat, MARC, and client basics](#)—Must be viewed before attending Book Cataloging. Attendance may be at a scheduled live online training or by viewing a recorded session.
4. Book cataloging
5. OCLC Connexion client online modules:
 - a. Module 2: [Basic bibliographic searching](#)
 - b. Module 3: [Basic editing and record processing](#)
 - c. Module 6: [Editing master records](#)
 - d. Module 7: [Advanced bibliographic searching](#)

*Modules may be viewed any time during the training process, before or after attendance at in-person classes. Attendance may be at a scheduled live online training or by viewing a recorded session.

6. Introduction to Authority Records
7. Library of Congress Subject Headings
8. OCLC Connexion client online module 9: [Authority control](#)
*Attendance may be at a scheduled live online training or by viewing a recorded session.
9. DDC or LC classification—whichever the library uses
10. Work individually with IHLS staff to catalog in Polaris. SHARE staff will provide training on use of MARC Report software.
11. Cataloging training for sound recordings and video recordings, after the cataloger has demonstrated proficiency with book format

Catalogers who desire to do original cataloging must complete OCLC Connexion client online module 8: [Original cataloging](#)

*Attendance may be at a scheduled live online training or by viewing a recorded session.

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 Step 10 above. Until that time, catalogers will submit import files to SHARE staff for review and import. Catalogers who progress to additional formats will submit those records for review and import by SHARE staff until each format is completed.

Attendance at classes is not required for staff members who have previous cataloging experience or who have completed a cataloging course. Bibliographic 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-related CE each fiscal year (July 1 – June 30).

[Additional requirements—cataloging libraries](#)

It is optional for cataloging libraries to have a subscription to the RDA Toolkit, or to purchase the print version. It is also recommended that

cataloging 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 10.