Cataloging and Linking Skills Checklist

Linking Requirements

1. Identify appropriate record (monograph vs. serial, author, title, publisher, copyright date, physical description, etc.)
2. Understand the components of the bibliographic record and its corresponding copy records.
3. Understand proper use of **subfield z (|z)** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285428-subfield-z-in-call-numbers).
4. Know how to add (link) or remove volumes or copies.
5. Understand and effectively use item notes.

Minimum Cataloging Requirements

1. Know the **General Skills** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000288838-general-skills-checklist) and be signed up for the appropriate **distribution list** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000284898-wyld-email-lists).
2. Be aware of **cataloging standards**: *Resource Description and Access (RDA), Anglo-American Cataloguing Rules, International Standard Bibliographic Description (ISBD), OCLC Bibliographic Formats and Standards, Library of Congress Subject Headings* and *Cataloging Standards* (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285219-wyld-cataloging-standards).
3. Be familiar with the WYLD members **Technical Support page** (https://library.wyo.gov/wyld/support/).
4. Be able to recognize and report duplicate bibliographic records to your local supervisor or to the WYLD office.
5. Verify & correct (if necessary) fixed fields.
6. Verify & correct (if necessary) the bibliographic description.
7. Configure SmartPORT settings in order to add or request records from LC or OCLC .
8. Add or request records from LC or OCLC and be able to overlay existing temporary records with records from LC or OCLC See **SmartPort settings technote** https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285439-smartport-property-settings).
9. Assign call numbers based on the SirsiDynix classification scheme(s) used by your library. Be familiar with the "List the Catalog by Call Number" helper or how to browse your library's shelflist.
10. Know how to create and delete a MARC holdings record. See **Removing MARC Holdings records technote** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285521-removing-

marc-holdings-records) and **Creating MARC Holdings records technote** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285520-creating-a-marc-holdings-record-for-serials-summary-holdings-statements).

11. Know how to access context sensitive online help in Symphony for instructions.
12. Know when to contact the WYLD Office for assistance.

Expert Requirements

1. Understand the implications of shadowing records.
2. Identify duplicate records and transfer your library's holdings using the Transfer Titles, Call Numbers and Items wizard. See the **Transfer Call Number from one bibliographic record to another technote** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285568-transfer-call-number-from-one-bibliographic-record-to-another).
3. For general information on RDA, use the WYLD Members Technical Support – RDA (**Resource Description and Access article** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285560-rda-information-for-wyld-libraries). Instructions on how to add RDA tags are provided there and in the **Elements for RDA tags 336 (Content Type), 337 (Media Type), and 338 (Carrier Type) technote** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285565-elements-for-rda-tags-336-content-type-337-media-type-338-carrier-type-).
4. Know how to locate and resolve temporary (On-The-Fly) records that either need to be removed, enhanced to Level 2 of Bibliographic Description (AACR2R) or enhanced for Core Elements (RDA) (see Appendix E of **Cataloging Standards** https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285219-wyld-cataloging-standards) or overlaid with records from LC or OCLC.
5. Be familiar with serials in order to correctly maintain serial copy and bibliographic records See **Serials Skills Checklist** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000288913-serials-skills-checklist).
6. Understand and manage bibliographic reports. See **Report Skills Checklist** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000288837-reports-skills-checklist).
7. Inventory items, if applicable.
8. Know how to validate headings using the "Validate Headings" helper.
9. Know how to create consistent series headings.
10. Know how to find SirsiDynix Manuals on the **Support Portal** https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285499-cataloging-training-guide (login required).

Additional Resources

- **OCLC Bibliographic Formats and Standards** (http://www.oclc.org/bibformats/en/fixedfield.html) for individual MARC tag information, including Fixed-Field Elements and 006 Leader
- **Understanding MARC (from Library of Congress)** (http://www.loc.gov/marc/umb/) for basic MARC record information
- **MARC Standards (from Library of Congress)** http://www.loc.gov/marc
- **RDA in MARC** http://www.loc.gov/marc/RDAinMARC.html

YouTube Tutorials on RDA

- **Resource Description & Access (RDA) Basics for Copy Cataloging** https://www.youtube.com/watch?v=6IUyBaDdc8c
- **RDA for the Non-Cataloger – What's in it for You?** (https://www.youtube.com/watch?v=aGuLhYGpMhw)
- **NCompass Live: Resource Description and What? RDA for Non Catalogers** https://www.youtube.com/watch?v=YT4H1R4-kV4

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