

Paths to Advancement in Minerva Cataloging

Revised 2026-09. All documents referenced can be found on this page of the Minerva website:
<https://www.maineinfonet.org/minerva/support/cataloging-serials/cataloging-rules-and-instruction/>

The following steps are primarily designed for staff with less than 3 years experience cataloging. The Minerva Cataloging Standards Committee recognizes the value of prior cataloging experience in systems other than Minerva and will adjust final requirements for experienced catalogers to advance to Level 3 permissions on a case-by-case basis.

Level 1 expectations

1. Be trained by staff with Level 2 or 3 cataloging permission
2. Be instructed in item volume field standards and appropriate use (see *Item Volume Field*)
3. Be familiar enough with minimal bibliographic record attributes to alert their Level 2 or 3 cataloger that a record needs attention (see *Acceptable Cataloging for Minerva Libraries*)

To go from Level 1-2

1. Be able to follow the document *Acceptable Cataloging for Minerva Libraries* for print books and *Minerva RDA Cataloging Standards* for other material types.
2. While watching the *Welcome to Minerva Cataloging* presentation, follow along with the presentation's documentation.
3. Watch *Attaching vs Creating* presentation slides and listen to recording.
4. Be able to follow requirements outlined in *Attaching vs Creating* document
5. Have knowledge of authority records and review how to import them from INN-View (see *Access Points* document)
6. View the *Series Training* presentation and follow the *Worksheet*
7. Be able to edit/delete periodical Check In cards according to the *Sierra Serials Manual for Minerva*
8. Be able to transfer items from one bib to another (see *Transfer an Item from One Bib to Another*)
9. Sign the document certifying they have completed each presentation and are able to follow all standards: *Path to Advancement Certification*

To go from Level 2-3

1. Watch all parts of the *Original Cataloging* presentation: Part I, Part II Recordings, Chats, Presentation Slides, and be able to follow the *Creating Original Records Guide*
2. Watch the powerpoint on series cataloging (*Series Training PowerPoint*)
3. Be familiar with and follow the *Series Entry Cheat Sheet*
4. Watch the cataloging DVDs and Blu-rays presentation and resources.
5. Be familiar with Minerva policies on, and follow all instructions related to cataloging DVDs and Blu-ray media: *On-order policy, Cataloging DVDs, Bootleg DVDs, Prepub and Bootleg policy, Bonus/Multidisc, Split DVD/BluRay*
6. View the presentation *Cataloging Graphic Novels* without fear.
7. Be familiar with and follow graphic novels documents *Quick Guide, Graphic Novels*
8. Be familiar with and able to follow instructions in *Checklist for Importing/Editing Bibliographic Records*
9. Agree to complete self-training on any other material type cataloging rules as needed for their job tasks.
10. Sign the document certifying they completed each presentation and are able to follow all standards, and request Level 3: *Path to Advancement Certification*

After submitting the Path to Advancement Certification for Level 3 the cataloger will follow the steps below. A maximum of six months is the goal to completion.

- Let the MCSC/Cataloging Specialist know what types of materials they will be cataloging (print, audio-enabled books, graphic novels, fiction, non-fiction, children's, e-books, e-audiobooks, DVDs, Blu-ray discs, video games, "library of things", etc.).
- The cataloger will be sent bibliographic record #s for items they have in their library which need updating to Minerva Standards.
- The MCSC/Cataloging Specialist will evaluate their record edits and give appropriate feedback, including asking the cataloger to complete any further edits needed.
- Once the reviewers agree the cataloger knows Minerva standards, they will be given a "test" level 3 login for an agreed upon time frame. (This training login is shared with other catalogers, so if the system requests a password change as it does regularly, let the MCSC know!)
- The only thing the training login is used for is to import a record or start an original bibliographic record. Once the cataloger saves it, a bib number is assigned to the record and the cataloger then needs to complete all editing work using their own login as follows.

- o They should have 2 cataloging windows open - the training login and their Level 2 login. Cut and paste the new bib number from the training login into the Search box using Record # in their Level 2 login. Open the record, then proceed with editing.
 - o Records imported/created in the test login should be suppressed in the test login and then unsuppressed in the cataloger's level 2 login while they complete their editing.
 - o They should not create items using the test login; it is not scoped to their library.
 - o There are no preferred record templates saved in the test login. All the system templates are available to choose from when an original record is started. They can choose their own library's templates or use generic templates.
- The cataloger will practice importing, editing, and creating records at their own pace. The cataloger may request scans of works not in hand, with no bibliographic records in Minerva, on which to practice. The cataloger will suppress their records until they are reviewed. The cataloger will send the MCSC a list of their bibliographic records to review.
- Once we have reviewed sufficient edited records, a remote meeting will be set up for the cataloger to “demonstrate live” their cataloging skills with items prepared for them in advance. This requires a workstation with Sierra and a camera; preferably also SkyRiver and a microphone. During the session the cataloger will be sent a PDF document of scans of physical items’ information for them to use to create an original bibliographic record and/or import a record. Once the bibs are created and the mock items attached the bibs will be suppressed and evaluated by the MCSC members after the “live” session.
- Committee members will confer and determine if the cataloger’s skills are adequate for Level 3 permissions.
- If another round of practice and another live demonstration is needed, we’ll ask them how much more time they’d like to work on their skills and then we’ll schedule a second demonstration/observation session.