

Steps in Becoming an Active UC CONSER Funnel Member

1. Talk about it.

Before becoming an active member, think about the benefits (see "[Advantages of CONSER Participation](#)"). What kinds of activities would make the most sense for your catalogers? Which of your staff would be interested in participating?

Remember that initial participation will involve CONSER maintenance. Typical maintenance activities include record enhancements such as: cessations, variant titles, backing up a title based on receipt of first issue, subject enhancement, and correction of typos. In other words, all the activities in which serials catalogers normally engage—but with the added power of being able to permanently update the OCLC master record.

With power comes responsibility. Funnel members commit to maintaining the CONSER database following national standards for cataloging, working directly in the OCLC database. While this commitment does not considerably add to the time taken in cataloging activities, it can involve adjusting local workflows. CONSER Funnel work also relies upon a well-defined reporting structure in place for those catalogers who will be involved at your institution.

2. Obtain approval at your institution.

Discuss UC CONSER Funnel participation with your boss and with administration. Make sure you have the support you'll need to get started—and for the long run.

Be aware that there is usually a monetary commitment to fund a visit from a Funnel trainer to the campus in terms of travel and accommodation expenses. This monetary commitment needs to be approved up front.

3. Determine who will be the Funnel liaison from your institution.

Each institution's liaison is responsible for:

- a. Coordinating and reviewing all CONSER maintenance activities
- b. Keeping current with CONSER practice and policy as documented in the CONSER Cataloging Manual, CONSER Editing Guide, CONSER Standard Record Guidelines, and also as announced through CONSERList
- c. Arranging for training, tools and documentation as needed
- d. Submitting records for review to your Funnel mentor/reviewer
- e. Communicating with Funnel members at other institutions
- f. Compiling and reporting CONSER statistics as required

4. Sponsor a site visit from a UC CONSER Funnel trainer.

A Funnel trainer or trainers will be assigned to your institution and will work with you to arrange a customized training day that will include:

- a. Orientation to the CONSER program and its philosophy of cooperation within a shared cataloging environment
- b. Confirmation that catalogers are trained in CONSER cataloging practice and are equipped with current documentation and tools

- c. Consultation in how to adjust existing workflows and/or reporting lines to accommodate working directly in OCLC and also to facilitate the sharing and review of records among the institution's catalogers
- d. Online demonstration of CONSER maintenance activities (editing and replacing records in OCLC)
- e. Discussion of cataloging questions/concerns from catalogers
- f. Explanation of the review process, mentor communication, statistics-reporting, and other duties of the Funnel liaison

5. Complete the mentoring and review process with a UC Funnel mentor.

Consult with your assigned UC Funnel mentor/reviewer as to the number of records they would like you to send (usually no more than 10 per week). Perform maintenance activity on existing CONSER records and submit records for review using the OCLC online save file. (For the first several weeks, surrogates will need to be sent to back up changes made.) Replace OCLC records using the CONSER authorization; communicate with your mentor/reviewer as needed.

Congratulations -- You are now an active member of the UC CONSER Funnel!