Conference call plus follow-up
2/4/2013; 2/7/2013rev

On the line: Sarah Gardner, Adolfo Tarango, Becky Culbertson, Renee Chin, Melissa Beck, Valerie Bross

REVIEW for UC CONSER Funnel NACO Members:

1. What are we doing now, for internal review?
    UCSD: Already contributing RDA records both for integrating resources (IRs) and serials. Informal review, exchanging records. Generally, not a huge number of questions; the group discusses any questions that come up.

    UCLA: Each cataloging group different. Cat & Met: has been cataloging in RDA for the past year, generally serials (very few IRs). Law: Has begun to catalog using RDA. Have run into some weird record relationships. EAL: Has been bringing records & questions to RDA Study Group before pushing the button. UCLA has set up an internal review in preparation for the exchange.

    Davis: Sarah will be training the staff this coming Thursday. Catalogers will begin applying RDA to continuing resources cataloging on Feb. 11. Questions about how aggressive to be about conversion of records. Would like to convert all pre-AACR2 records: Have issues or surrogates available. Intend to review work up through March 4th; then the LA4s will be off of review. UC Davis has a shared save file, so completes review through this file. This save file will also be a nice way to collect records for exchange.

    CONCLUSION: All of three cataloging groups are ready to start.

2. What will be scope of the exchange?
    To include both serials and integrating resources.
    Limit: Review will cover general PCC/CONSER practices, not language-specific comments, esp for resources in non-roman scripts. We can check for internal consistency, though.

3. How many records per group?
    Based on the pre-conference suggestion, each group should plan on exchanging at least 10 records representing that campus's work.

4. How should it work?
    a. Each review period begins Friday and ends the following Thursday.
    b. Submitting records:
        --Follow the usual local procedures for completing CONSER cataloging.
   --**After** completing cataloging, enter record in online save file: Action, Save to online file.
          Note: Order of steps is important. If the cataloger puts a record in the online save file and THEN updates or replaces the record, it will disappear from the save file.
   --Retrieve record: Cataloging, Search online file
        --Code record to make it available to the two other groups: Action, Submit for review. Enter the codes for the other cataloging groups, separated by semi-colon: CUV;CUS;CLU
        --For authentication and maintenance, save a "before" version of the OCLC record as well as the "after" version
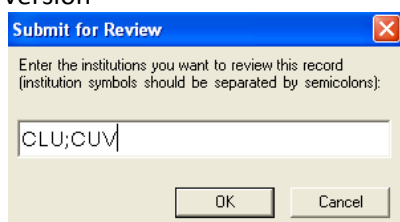
b. Retrieving records for review: In Connexion Client:
   --Cataloging, Search online save file
   --Check the "All Review File Records" box and enter OCLC symbol.
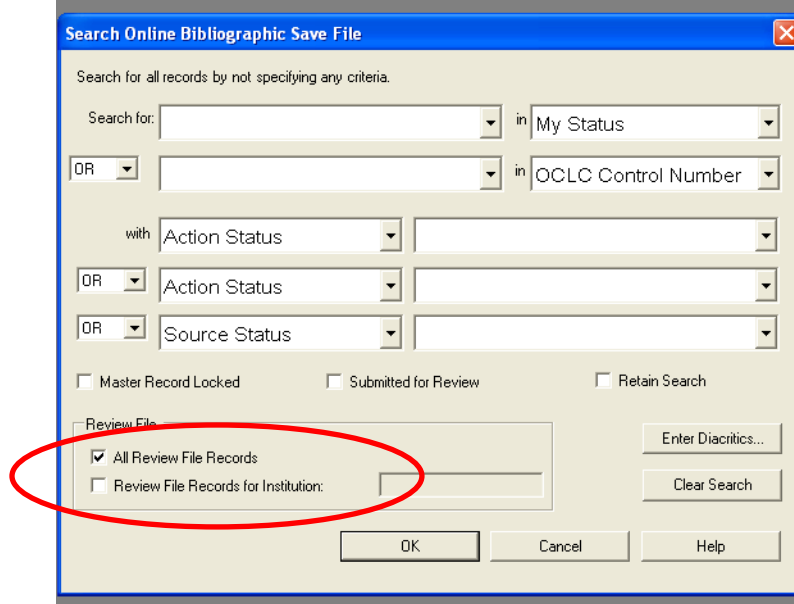
You will then see a list of records to review for the coming week:

Save #	Title	Expires	Owning…	Reviewing Institutions
7	Vertical agreements.	14	CLU	CUS, CUV, CLU
20	All California / Rich's Business Information.	26	CUS	CUS, CUV, CLU
34	Journal of Mathematics & Technology	13	CUS	CLU, CUS, CUV
40	European journal of pure & applied mathemat…	14	CUS	CLU, CUS, CUV
41	European journal of pure and applied mathe…	14	CUS	CLU, CUS, CUV
27	Journal of Mathematics and Technology	14	CUS	CLU, CUS, CUV
25	Žemės ūkio inžinerija : mokslo darbai / Lietuv…	14	CUS	CLU, CUS, CUV

c. GoogleDocs for Additional data: A GoogleDocs folder has been established to facilitate review.
   In addition to recording the OCLC record number, contributors to the exchange may wish to include surrogates. Or, contributors may have specific questions for others to consider.

   1) Contributors with a Google account, may post directly to the folder: UC CONSER Funnel
      (https://docs.google.com/folder/d/0By9SKXya2CIXQWZXSUdVZWhMMU0/edit?usp=sharing)
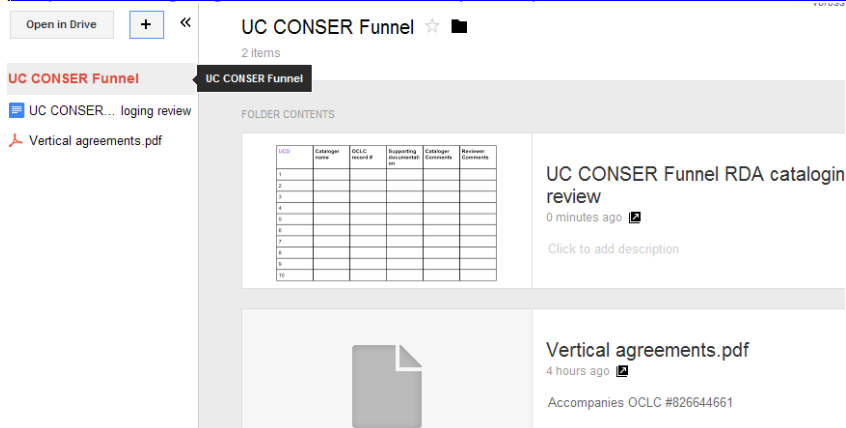
2) First, post any support files to the GoogleDocs site. To upload a file, click on the plus sign on the left-hand navigation bar. That will open up a list of options.
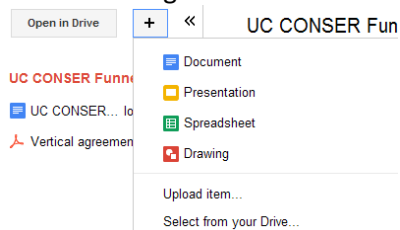
Note that the default permissions level is "anyone who has the link can edit."

3) Second, find the appropriate library and enter basic information about the resource cataloged. Essentials are: OCLC record number, link to any supporting documentation (if needed), and cataloger comments (if needed). Groups may choose whether to include cataloger names or use some other tracking device to be able to return comments to the appropriate person.

UCSD	Cataloger name	OCLC record #	Supporting documentation	Cataloger Comments	Reviewer Comments
1	Renee	NEW (Title: All California)	Resource URL: http://www.richsdata.com/Packages/119/all_california.html		
2	Becky	#786945456	http://bibpurl.oclc.org/web/48201 (also ASC)	sorry--I forgot to send the "before" picture	

4) If you lack a GoogleDocs account or encounter any difficulty using GoogleDocs, contact Renee Chin, the Funnel Communications Coordinator (rmchin@ucsd.edu).

5. Workflow:
   a. During the week, participating catalogers will complete work, save records to the OCLC file, and annotate the GoogleDoc for the week. All CONSER RDA records welcome, but mark those records that warrant special attention.
   b. Every Friday, participants will check for OCLC numbers shared by the other two groups and make comments on the GoogleDocs page.
   c. The goal is to get all comments recorded within the week.
   d. Unresolved questions will be posted to CONSRLST or to CONSER@loc.gov for resolution.

6. Time: The exchange will run through February (2- 4 weeks). Next tel call toward the end of the month

SUPPORT for non-NACO Members
1. Encourage campus liaisons to register (or have the CONSER catalogers register) for one of the free CONSER Bridge Workshops

2. Contact liaisons whose groups have completed the training. So far, Carole McEwan (UC Irvine) is the only one known to be preparing for UC CONSER Funnel work in the near future. She has signed up for the February Bridge Training. Berkeley & Santa Barbara have both stated that they intend to wait until June 2013 for implementation. (But we need to monitor)

3. Next conference call: To discuss
   a. Options for support: extending exchange strategy? One of the three NACO groups mentoring non-NACO campus?
   b. Problems: One of the PCC task group reports before PoCo recommends requiring conversion to RDA for all new AND maintained records (after March 31). If approved, that would require all active participants to become NACO members. However, if PoCo drops this recommendation, UC CONSER Funnel members may continue to contribute as in the past.