

CONSER Publication Pattern Initiative New Member Mentoring

Prepared by Workflow Task Group

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Checklist for Mentors:

1. Give mentees the “Checklist for Mentees” (see next section).
2. If this has not already occurred, ask mentees to contact their local OCLC offices and Robert Bremer at OCLC (<bremerr@oclc.org>) for CONSER authorization, and Les Hawkins at LC for online statistics form and directory.
3. Ask Diane Hillman (<dih1@cornell.edu>) to add to the CONSERHOLD listserv the email addresses of the mentees and/or those of whoever are participating in the institution.
4. Tell mentees to download the macro for PASSPORT or CatME and to apply it when editing OCLC records.
5. Go over sources of information with mentees, e.g., CONSER Publication Pattern Initiative homepage, MARC 21 Format for Holdings Data, Guidelines for the pattern project, Pattern guide and examples, CONSERHOLD discussion, etc.
6. Review mentee’s pattern input or problem patterns (e.g., for the first 10-50 patterns or for 1-4 months) until the institution is deemed independent. Inform and discuss any correction that the mentee needs to make.
7. Emphasize to the mentees that they are authorized to edit fields related to the publication pattern only, i.e., Freq, Regl, 310, 321, 362, 500, 515, 891.

Tell mentees that once they have the authorization, they are technically capable of doing just about anything, but CONSER is trusting them not to.

If the mentee encounters a message indicating the record is too long while updating the OCLC record, ask the mentee to follow the instructions in the CONSER Editing Guide C14 (excerpt available at <http://128.253.121.110/CONSERHOLD/CEG-C14.html>) and report them on the CONSER page <http://www.oclc.org/secure/marc/510.htm>.

8. Be available for questions after the review period.
9. Share local workarounds in the ILS with mentees.
10. Share workflow experience with mentees.

Checklist for Mentees:

1. Contact your local OCLC network office and Robert Bremer at OCLC (<bremerr@oclc.org>) to inform them your library is participating in the CONSER Publication Pattern Initiative and ask for the CONSER authorization (i.e., login and password).
2. Send Les Hawkins (<lhaw@loc.gov>) the following information for the online statistics and directory. You will get credits for the work you do.

CONSER Publication Pattern Initiative Member

Name of institution: _____

OCLC billing number: _____

Local system used: _____

Contact person: _____

If not the CONSER operations representative, please supply:

Phone: _____ Fax: _____

Email: _____

3. If you use PASSPORT, go to <http://www.oclc.org/oclc/passport/download.htm> to find the macro named "pubpat.mbk." If you use CatME, go to <http://www.oclc.org/catme/macros/download.shtm> to find the macro named "Pubpat.mbk."

Download the macro by following the instructions below.

- Shift click the macro's name. A "Save As" window will display.
- From the pull-down menu of "Save in" box, choose your local hard drive (may be C: or D:).
- Open/Double click on the folder "Program File," then "OCLCAPPS," then "PASSPORT" or "CatME," and then click the Save button to save the macro to the "PASSPORT" or "CatME" folder.

Assign a shortcut key for the macro.

Open "PASSPORT" or "CatME." On the menu bar, click on "Tools," then "Customize." Click on "Macros" under "Category" (on Keyboard page), and "PUTPAT!PubPat" should be among the macros listed. Click on "PUTPAT!PubPat." Press the key(s) you want to use as the shortcut key(s) for this macro. Click the "OK" button to save the shortcut key assignment.

NOTE: The macro is to assist in formulating publication pattern fields in CONSER records in OCLC. To add a pair of 891 fields to an existing record, retrieve and lock the particular serial record, then, activate the macro. If the record is new, complete the description, then, activate the macro. The macro looks at the fixed field frequency code, fields 310, 321, 362, 500 (Description based on note), and 936. Based on the information in these fields, it adds a pair of 891 fields to the record. Sometimes the resulting 891's are not exactly correct. For example, a redundant subfield v code c may be generated in 853 for an annual title. Sometimes the incorrect coding results from the 362 field being in the pre-AACR2 format. Catalogers should review the results and make necessary edits.

4. Before adding any pattern in a CONSER record, familiarize yourself with the CONSER Guidelines for Input of Caption/Pattern and Holdings Data available at (<<http://128.253.121.110/CONSERHOLD/guidelinesTOC.html>>)
5. Other sources of information are available at CONSER Pattern Initiative's homepage: <<http://lcweb.loc.gov/acq/conser/patthold.html>>, e.g., the pattern guide tables, examples, and sample records.

Also consult MARC 21 Format for Holdings Data. The concise edition is available at <<http://lcweb.loc.gov/marc/holdings/echdhome.html>>. The complete edition (ISBN 0-8444-0999-5) is available from the Cataloging Distribution Service, Library of Congress, Washington, D.C. 20541-4912. It is also accessible via Cataloger's Desktop.

6. Record the OCLC numbers of records updated and email them to your mentor for review. If there are changes to be made, your mentor will notify you. Your institution will need to send records for review (e.g., the first 10-50 patterns or for the first 1-4 months) until your institution is deemed independent.
7. Ask your mentor questions if you have any. The questions may range from how to code a particular pattern to how to workaround the pattern/holdings data in your local system.
8. Report monthly statistics on the Web form set up by Les. The categories include
 - new publication pattern added to your original record,
 - new publication pattern added to existing record,
 - subsequent publication pattern added,
 - publication pattern modification.