

## Acquisitions Activities

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## Revision History

<b>Date</b>	<b>Section title</b>	<b>Description of changes</b>
June 2009	3. Export selected items; 4. Download files	Added information about how files delivered via FTP are displayed and managed on the Download Export Files screen. Updated details about data in exported records.
	5. Select file delivery and export method	Updated to clarify retention and management of files delivered via FTP on the Download Export Files screen.
	8. Keystrokes	Updated to include new and changed shortcut keys.
January 2010	8. Keystrokes	Updated to include new shortcut key for E-mail function.
	5. Select file delivery and export method	Provides revised information on file names for files of exported records delivered via FTP.

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# 1 Access WorldCat Selection

## Log on to Selection

	Action
1	Point your browser to the OCLC Connexion service: <a href="http://connexion.oclc.org">http://connexion.oclc.org</a>
2	At the Connexion login screen, enter a WorldCat Selection authorization and password. Click <b>Logon</b> or press <Enter>. <b>Note:</b> The authorization you use to access Selection may be for Selection only or an authorization for another service to which you added Selection privileges.
3	At the Connexion welcome screen, click the <b>Selection</b> tab. Or press <Alt><;> (semicolon).  <b>Result:</b> <ul style="list-style-type: none"> <li>• A new window opens for the WorldCat Selection session.</li> <li>• The Connexion session remains active until you end the session or an inactivity timeout occurs. You can end the Connexion session now: switch to the Connexion window and then click <b>Logoff</b> (top right) or press &lt;Alt&gt;&lt;L&gt;. Or close the browser window for the Connexion session.</li> </ul> <b>Note:</b> Your view of Connexion presents only the tabs you are authorized to use. For example, Selection-only users see the Selection tab and the General tab; Selection and Cataloging users also see the Cataloging and Authorities tabs.

### Authorization levels

- **Three levels: Selector, Acquisitions, Administrator.** Levels, and their respective capabilities, correspond to typical divisions of responsibility and tasks within an institution.
- **Multiple levels.** You can combine two or three levels on one Selection authorization.
- **Selection tabs.** Your view of Selection presents only the tabs you are authorized to use. For example, if yours is a Selector-only authorization, only the Selector and Preferences tabs appear.

Authorization level	Capabilities
Selector	Selector tab: <ul style="list-style-type: none"> <li>• View notification records routed to you.</li> <li>• Modify records to specify fund, location, price, and ISBN order; selector can also enter notes. (Other record content is read-only.)</li> <li>• Take actions on notification records to select titles, reject them, defer a decision (and indicate a reason), or forward a record to another selector.</li> </ul> Preferences tab: Use Selector Preferences to customize presentation of lists of notifications.

Authorization level	Capabilities
Acquisitions	Acquisitions tab: <ul style="list-style-type: none"> <li>• View a summary of all records currently selected by all selectors at your institution.</li> <li>• Export all selected records.</li> <li>• Download files of exported records and load the records into your ILS.</li> <li>• View a history of records loaded into Selection for your institution during the last 30 days.</li> </ul>
Administrator	Administrator tab: Establish institution settings: Examples include: <ul style="list-style-type: none"> <li>• User names and their aliases</li> <li>• Fund codes and descriptions</li> <li>• Location codes and descriptions</li> <li>• User-specified note fields: labels, possible values, mapping to exported records</li> <li>• Enable system to identify subject areas of titles (by call number range or keywords) and route notifications to assigned selectors</li> </ul> <p><b>Note:</b> Currently, you complete some administrative tasks within the system, using an administrator interface. For those settings not yet supported in the interface, you work with OCLC staff. OCLC is working on an enhanced administrator module that enables you to set or change all options directly.</p>

**Set up automatic logon (Local Browser Settings)**

- To avoid retyping your WorldCat Selection authorization number and password each time you log on, save this logon information using the Local Browser Settings feature of the Connexion logon screen.
- You can save up to ten authorizations and passwords and then select the authorization to use when logging on. If desired, set your most-used authorization as the default. Your default logon information appears automatically on the logon screen; click **Logon** or press <Enter> to start a session.
- For each entry, you can save an authorization number only or authorization and password.
- The logon information you supply is saved by your browser as a cookie. The cookie, a small text file, resides on your workstation, in your browser's cookies folder. If you use multiple browsers to access Connexion (for example, if you use both Internet Explorer and Netscape), you must save the Local Browser Settings in each browser.
- As a security measure, the system encrypts your authorization and password both when storing them on your workstation and when sending them to the Connexion browser.
- To save your authorization and/or password, you must enable cookies in your browser.

### Use Local Browser Settings

On the Connexion logon screen, click the Local Browser Settings link. In the Local Browser Settings window, use the instructions in the following table to set up automatic logon.

To do this	Procedure
Save a default authorization	<ol style="list-style-type: none"> <li>1. Type an authorization number (required).</li> <li>2. Type a password (optional). If you prefer to enter the password each time you log on, leave the Password box empty.</li> <li>3. In the Name box, type an identifier (up to 8 characters) for the authorization/password combination (optional).</li> <li>4. In the Dewey-Only box, for a Selection authorization type <b>N</b> (required).</li> <li>5. <b>Set as default authorization.</b> Click to select the <b>Default</b> option button for the authorization you entered. Or select <b>No Default Authorization</b>.</li> <li>6. When finished, click <b>Save Settings</b>. Then click <b>OK</b>.</li> </ol>
Save multiple authorizations	<ol style="list-style-type: none"> <li>1. For each entry,               <ul style="list-style-type: none"> <li>— Type an authorization number (required).</li> <li>— Type a password (optional). If you prefer to enter the password each time you log on, leave the Password box empty.</li> <li>— In the Name box, type an identifier (up to 8 characters) for the authorization/password combination (optional).</li> <li>— In the Dewey-Only box, type <b>Y</b> or <b>N</b> (required).</li> </ul> </li> <li>2. Repeat step 1 to add another entry.</li> <li>3. <b>Set a default authorization (optional).</b> Click to select the Default option button for the authorization you want to use. Or select <b>No Default Authorization</b>.</li> <li>4. When finished, click <b>Save Settings</b>. Then click <b>OK</b>.</li> </ol>
View list of saved authorizations and names	<ol style="list-style-type: none"> <li>1. On the logon screen, open the Choices list and click the <b>last</b> item, <b>More Details</b>.</li> <li>2. In the Authorization List window, click an authorization number to select it. Or click <b>Close Window</b> to return to the logon screen.</li> </ol> <p><b>Results</b></p> <p>When you click an authorization number, the Authorization List window closes and the selected authorization appears on the logon screen, ready for use.</p>
No default authorization	<ol style="list-style-type: none"> <li>1. Click to select the option button for <b>No Default Authorization</b>.</li> <li>2. <b>(Optional) Default Dewey-Only logon.</b> To set the Dewey-Only Session logon screen as the default, change the Dewey-Only setting to <b>Y</b>.</li> <li>3. Click <b>Save Settings</b>. Then click <b>OK</b>.</li> </ol>

To do this	Procedure
Save new or changed settings	<p>Click <b>Save Settings</b>.</p> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>• The system displays a confirmation message.</li> <li>• When you click <b>OK</b>, the Local Browser Settings window closes.</li> </ul>
Undo changes, restore previously saved settings	<p>Click <b>Reset</b>.</p> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>• The system cancels any changes you made since you opened the Local Browser Settings window.</li> <li>• Settings previously saved (if any) appear on the screen. Or the system restores the original system defaults (all text removed, no default authorization).</li> </ul>
Restore system defaults (delete all entries)	<ol style="list-style-type: none"> <li>1. Click <b>System Defaults</b>.</li> <li>2. Click <b>OK</b> to confirm that you want to erase all saved authorizations/passwords and set Dewey-Only options to <b>No</b>.</li> </ol> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>• Authorization numbers, passwords, and Dewey-Only settings are removed.</li> <li>• <b>No Default Authorization</b> is selected, with Dewey-Only set to <b>No</b>.</li> </ul>

**Log off Selection (end session)**

<b>Action</b>
<p>Click <b>Logoff</b> or press &lt;Alt&gt;&lt;O&gt;.</p> <p>The system ends your session. When you log off, Selection automatically saves and closes any open records.</p> <p><b>Note: Connexion window.</b> The Connexion session that you started when you first logged on may remain active or, if a timeout occurred, the Connexion logoff screen may appear in the window. At the bottom of the logoff screen is a link to the logon screen, so that you can log on again conveniently.</p>

**Selection session ended by browser close or inactivity timeout**

- If you close your browser without logging off, Selection logs you off automatically.
- Selection automatically ends an inactive session after 120 minutes.

## 2 WorldCat Selection workflow summary

- Selection workflow**
- The following table outlines routine processing of notification records using WorldCat Selection.
  - Preliminary administrator tasks are not included in this outline.

Done by	Action	Results/Notes
Materials vendor	Send notifications for new publications, based on a profile defined by the library. Identify recipients: institutions and (optionally) selectors.	
WorldCat Selection system	Merge vendor notifications with matching WorldCat records.	
WorldCat Selection system	Route notification records to institutions and selectors.	Records arrive in selectors' Inboxes. Records go to a selector identified in vendor data. Or, if vendor does not designate a selector, records go to selector responsible for the subject area. System determines subject area by call number, by keywords found in the record, and by values for certain elements in the record's fixed field. The administrator specifies call number ranges, keywords, and element values that identify subjects. Unmatched records go to the default selector.
Selector	Review notification records in Inbox and Forwarded to Me folders.	Selector scans lists, views full records.
Selector	Forward records to other selectors. Choose a selector name and take the <b>Forward</b> action.	Records move from Inbox to the recipient's Forwarded to Me folder.
Selector	Reject records for materials already selected by another, previously ordered, currently held, or unsuitable based on collection policies. Take the <b>Reject</b> action.	Records move from Inbox to Rejected folder.

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Done by	Action	Results/Notes
Selector	Defer a decision on records. Choose a reason for the deferral. Then take the <b>Defer</b> action.	Records move from Inbox to Deferred folder.
Selector	For titles you plan to select, make desired changes to the records. View the full record and then change values for fund, location, price, or ISBN order. Enter notes or change existing notes if applicable. Then take the <b>Select</b> action.	Other record content is read-only. Records move from Inbox to Selected folder.
Acquisitions staff	Export records for selected materials. Review the Summary screen for records currently selected by all selectors at your institution. Then click <b>Export Selected Records</b> .	Exported MARC records are stored in a file on the WorldCat Selection server. On the Acquisitions tab, new files of exported records are listed on the Download Exported Records screen. On the Selector tab, records move from selectors' Selected folders to their Exported folders.
Acquisitions staff	Download files of exported records. At the Download Exported Records screen, choose the file(s) to download. Then click <b>Download</b> . Save the file in the location used for loading records into your integrated library system (ILS).	The file name is defined by your Selection administrator as part of settings for your institution.
Acquisitions staff	Load records exported from Selection into your ILS.	If the ILS imports records automatically from a designated location, this step occurs without staff intervention.
Acquisitions staff	Review and track processing of records from vendors that have been loaded into Selection for your library.	The History screen on the Acquisitions tab lists records loaded into Selection for your institution during the last 30 days.

### 3 Export selected items

**About the Selected Items screen**

- The Selected Items screen shows the total number of selected records for all selectors at your institution.
- The screen provides three views of the distribution of the selected records: by fund, by source (vendor), and by selector.
- The tables listing vendors and funds include check boxes for choosing specific funds and/or vendors for which to export records.
- Use this screen to monitor the accumulation of selected records and to export all currently selected records, records from one or multiple vendors, or records for one or multiple funds. You can also combine vendor and fund criteria to export records that are **both** from one specified vendor **and** purchased using one specified fund.
- **Automatic export.** If you choose to export records automatically, you do not need to take any action on the Selected Items screen. However, you can use the screen to monitor the number of records selected and their distribution by selector, vendor, and fund.

**Export selected records**

**When to export selected items?** You determine when to export, based on your workflow and policies.

	Action
1	Go to the Selected Items screen: <b>From another tab:</b> Click the Acquisitions tab or press <Alt><Q>. <b>From another Acquisitions screen:</b> Click <b>Selected Items</b> or press <Alt><S>.
2	Review the information on selected records.

	Action
3	<p><b>Specify records to export</b>  <b>All selected records</b> (default setting)</p> <p>If the check box labeled <b>Export All Vendors and Funds</b> is empty, click to place a check mark in the box.</p> <p><b>Records grouped by vendor or fund</b></p> <p>In the Vendor distribution table, click to select (check) the box for each vendor whose records you want to export.            Or            In the Fund distribution table, click to select (check) the box for each fund for which you want to export records.</p> <p><b>Records grouped by vendor and fund</b></p> <p>In the Vendor distribution table, click to select (check) the box for the vendor whose records you want to export.            And            In the Fund distribution table, click to select (check) the box for the fund for which you want to export records.</p> <p><b>Note:</b> You can group records for export <b>by vendor</b> or <b>by fund</b> or <b>by vendor and fund</b>.</p>
4	<p>Click <b>Export Selected Records</b> or press &lt;Alt&gt;&lt;X&gt;.</p> <p><b>Results:</b>            The system exports all selected records <b>or</b> a specified group of records to an online file at OCLC or to <b>both</b> an online file <b>and</b> to your institution's folder on an OCLC FTP server. Each export action creates <b>one</b> file that contains the records you specified.            If you specified multiple vendors and/or funds, the system combines records for the specified vendors/funds into <b>one</b> export file.</p> <p><b>All records:</b> On the Selected Items screen the total is reset to zero and no distribution summaries appear. For each selector, records move from the Selected folder to the Exported folder.</p> <p><b>Specified group(s) of records</b> The system updates information on the Selected Items screen to reflect the number of records exported and the specified vendor(s) and/or fund(s).</p>

**Distribution summaries for selected records**

**Note:** No distribution data appears if no records are currently selected.

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Distribution area	Description
Fund distribution	Lists the funds selectors specified to pay for selected items. For each fund, gives the fund code, fund description, and the number of associated records.
Source distribution	Lists the vendors that supplied one or more selected notification records, and shows the number of records selected for each vendor.
Selector distribution	Lists names of the selectors with records currently in their Selected folder and the number of items for each selector.

### Exported records: details

Record content	Data source	Data handling / Notes
Bibliographic record	WorldCat. Current copy of the master record retrieved at time of export	Export fails if access to WorldCat is not available. System displays an error message.
ISBN	<b>Multiple ISBNs:</b> If selector changes order, the ISBNs appear in the new order.	One or more instances of MARC field 020, subfield a, from WorldCat record.
Holding library code	Default holding library code for institution	MARC field 049, subfield a from WorldCat record.
Fund	Specified by selector.	MARC field/subfield specified by administrator. Record contains fund data, not description used in Selection.
Location	Specified by selector	MARC field/subfield specified by administrator. Record contains location data, not description used in Selection.
Price	Specified by selector	MARC field/subfield specified by administrator.
Currency	Records may include currency type if specified by administrator	MARC field/subfield specified by administrator.
Note fields (up to 3)	Text specified by selector	MARC field/subfield specified by administrator.
Quantity	Specified by selector	MARC field/subfield specified by administrator.
Selector name	Name associated with the authorization by administrator	MARC field/subfield specified by administrator.
Vendor name	Vendor data	MARC field/subfield specified by administrator.

## Acquisitions Activities

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<b>Record content</b>	<b>Data source</b>	<b>Data handling / Notes</b>
Vendor customer ID	Vendor data	MARC field/subfield specified by administrator.
Vendor control number	Vendor data	MARC field/subfield specified by administrator.
Vendor note	Vendor data	MARC field/subfield specified by administrator.
Special vendor code	Text (up to 60 characters) supplied by administrator for active vendors	MARC field/subfield specified by administrator.

## 4 Download files of exported records

### About the Download Export Files screen

- Use the screen to download and manage files of records exported from WorldCat Selection.
- **All export files are available from this screen.** If your export destination is Online (default setting), files are available **only** via the Download Export Files screen. If your export destination is **FTP and Online**, export files are available from your institution's folder on an OCLC FTP server **and** from this screen.
- **Export files:**
  - Are created and stored online at OCLC.
  - Contain records exported by one user (authorization number).
  - Remain available via the Download Export Files screen for 30 days from the file creation date. After 30 days, the system automatically deletes export files.
- **Files exported via FTP.** Export files sent to your FTP location are available for access for 90 days from the file creation date. After 90 days, the files are automatically deleted.

### Download files of exported records

	Action
1	Go to the Download Export Files screen: <b>From another tab:</b> Click the Acquisitions tab or press <Alt><Q>. <b>From another Acquisitions screen:</b> Click <b>Download Export Files</b> or press <Alt><P>.
2	1. In the list of files, find the file(s) you want to download. 2. Click the check box for each file to include. <b>Download multiple files:</b> You can download two or more files at once. Before sending the files to the browser, the system creates <b>one</b> file that contains records from <b>all</b> selected export files.
3	When finished choosing files, click <b>Download</b> or press <Alt><D>.
4	The downloading process varies slightly depending on which browser you use. <ul style="list-style-type: none"> <li>• <b>Internet Explorer.</b> In the File Download dialog box, select <b>Save</b> or press &lt;Enter&gt;.</li> <li>• <b>Netscape Navigator.</b> In the Unknown File Type dialog box, click <b>Save File</b>.</li> </ul>
5	1. In the Save As dialog box, use the Save In box to select the location (drive and folder) where you want to save the exported record. 2. In the File Name box, use the supplied name. (The export file name is defined by your administrator.) <b>Troubleshooting tip:</b> When using Internet Explorer, if the Save As dialog does not open, see the section (later in this topic) titled <b>Browser settings for file downloads</b> .

	Action
6	<ul style="list-style-type: none"> <li>Click <b>Save</b> or press &lt;Enter&gt;.</li> <li>Click <b>Close</b> or press &lt;Enter&gt; to close the Download Complete message box.</li> </ul>
7	<p><b>Next steps:</b></p> <ol style="list-style-type: none"> <li>Import the file of records to your local system (ILS).</li> <li>Within your ILS, make any necessary changes to the records and then order the selected materials.</li> </ol>

**Manage export files**

This section summarizes information and functions provided on the Download Export Files screen.

**Information provided for each export file**

Column in file list	Purpose or content
Check boxes	Use check boxes to indicate files to download, hide, etc.
Authorization	Shows the authorization number under which the file was created. May show your authorization number or that of other users from your institution. <b>Note: Automatic export.</b> If you choose to export records automatically, the system uses the authorization associated with your institution's default selector. For all automatically created export files, the list shows this same default authorization.
Created	Date and time when the file was created.
Bytes	Size of file in kilobytes.
Records	Number of records in the file.
Downloaded	Date when the file was first downloaded. Shows <b>Not Downloaded</b> for a file not yet downloaded. Shows <b>Delivered via FTP</b> for export files sent to your FTP location. If you download one of these files, the column shows the date when the file was first downloaded.
Vendors and/or Funds	Identifies the vendor(s) and/or fund(s) associated with the records in each export file.  <b>Note:</b> Vendors and/or funds are listed <b>only</b> for files created when you export records for specified vendor(s) or fund(s). No vendors or funds are listed for files created by exporting records for <b>all</b> vendors/funds.

Column in file list	Purpose or content
Hidden Appears when you click <b>Show Hidden Files</b> to view a list containing files previously hidden.	If the file is currently hidden, lists the date and time the file was hidden. If the file has been restored to the list, the column is blank.

**Actions available for export files**

Action	Procedure
Download an export file	Select the check box for the file and click <b>Download</b> or press <Alt><D>.
Hide downloaded file	Select the check box for a previously downloaded file and click <b>Hide</b> or press <Alt><H>. <b>Note:</b> You can hide a file for which <b>Delivered via FTP</b> appears in the Downloaded column, even if you have not downloaded the file.
Show hidden file	Click <b>Show Hidden Files</b> or press <Alt><W>.
Restore hidden file to list	1. Click <b>Show Hidden Files</b> or press <Alt><W>. 2. Select the check box for a hidden file and click <b>Restore</b> or press <Alt><R>.
Clear all check boxes	Click <b>Reset</b> or press <Alt><T>.

**Browser settings for file downloads (Internet Explorer)**

To prevent problems when downloading export files, make sure that your browser is configured to allow automatic file downloading. This section explains how to locate the security options and details the settings required to download files via Internet Explorer version 6 or 7 on Windows 2000 or Windows XP.

	Action
1	In Internet Explorer, on the Tools menu, select Internet Options.
2	On the Security tab, select the Internet zone, and then click the Custom Level button. A dialog opens with a scrolling list of custom security options.
3	In the list of options, find and set the items required for your version of Windows and of IE, as indicated in the following table.

Windows version	Internet Explorer version	Required settings
2000 and XP	IE6 and IE7	<b>Downloads</b> --> File download --> Enable
XP only	IE6 and IE7	Additional setting for Windows XP, with either IE6 or IE7: <b>Downloads</b> --> Automatic prompting for file downloads -----> Enable

## 5 Select export file delivery and export method

### About the Export Settings screen

- The Export Settings screen allows acquisitions staff to manage record exporting by selecting the delivery destination for export files and enabling automatic export.
- Users whose authorizations include acquisitions capabilities can set or change these options. Administrator privileges are not required.

### Go to the Export Settings screen:

- **From another tab:** Click the Acquisitions tab or press <Alt><Q>.
- **From another Acquisitions screen:** Click **Export Settings** or press <Alt><X>.

### Select delivery destination for export files

	Action
1	<p>In the Export Delivery area, specify your preferred location for file delivery:</p> <p><b>Online</b> (default setting)</p> <p>Files of exported records are stored online at OCLC; you can download the files from the Download Export Files screen. Files are retained for 30 days from the file creation date. After 30 days, files are deleted.</p> <p><b>FTP and Online</b></p> <p>Files of exported records are stored in your institution's folder on an OCLC FTP server. Files on the FTP server are retained for 90 days from the file creation date. After 90 days, files are deleted.</p> <p>Use an FTP client or custom script to monitor this folder and transfer export files to your site, enabling you to load the records into your ILS.</p> <p>Files are also stored online at OCLC; they are available from the Download Export Files screen. Files are retained for 30 days from the file creation date. After 30 days, files are deleted. On the Download Export Files screen, files exported to the FTP server are identified as <b>Delivered via FTP</b>.</p>
2	Click <b>Save</b> or press <Alt><V>.

Select export method

	Action
1	<p>In the Export Method area, specify your preferred method for exporting records:  <b>Manual export</b> (default setting)                      For each export action, use the Selected Items screen to specify which records to export. Then click <b>Export Selected Records</b>.  <b>Automatic export</b> Select one of the three options:  <b>Automatic - All records in one file</b> The system creates one export file that contains all records currently selected.  <b>Automatic - Separate files per fund</b> The system creates separate export files; each file contains selected records from one fund.  <b>Automatic - Separate files per vendor</b> The system creates separate export files; each file contains selected records associated with one vendor.</p>
2	Click <b>Save</b> or press <Alt><V>.

Details: file delivery options

Delivery option	Description
Online	<p>Default option  <b>File access.</b> Export files, whether created manually or automatically, are stored online at OCLC and are available for download from the Download Export Files screen.  <b>Retention.</b> Files are retained for 30 days from the date of export.</p>
FTP and Online	<p>Export files, whether created manually or automatically, are transferred to your institution's folder on an OCLC FTP server.  <b>File access.</b> Use an FTP client or a custom script to monitor your folder on the FTP server and automatically transfer new files to a location at your site. Records can then be loaded automatically to your ILS.  <b>Retention.</b> On the FTP site, files are retained for 90 days from the date of export.  <b>File names.</b> Names of files on the FTP server begin with a fund code, a vendor name, or the text <b>AllVendors</b>. The remainder of the name is a unique number comprised of the date (Dyyyymmdd) and time (Eastern Time) in 24-hour clock format, including hours, minutes, and seconds (Thhmmss). Examples:                      AllVendors.D20091130.T174310.dat                      JBF1.D20100215.T043548.dat                      All export files are also stored online at OCLC and are available for download from the Download Export Files screen. Files are retained for 30 days from the file creation date; after 30 days, files are deleted. On the Download Export Files screen, files exported to the FTP server are identified as <b>Delivered via FTP</b>.</p>

Details: FTP file transfer methods

- To transfer files from the FTP server, use one of the two methods described in the table.

- You do not need to request an account; OCLC sets up accounts for all Selection subscribers. As part of account setup, OCLC assigns your institution a username and password. OCLC notifies you that your FTP account has been set up and provides your username and password.
- To transfer your export files, you log on to your account on the FTP server by entering your institution’s assigned username and password.
- Choose the method that fits your workflow and/or integrates easily with your existing application for automated file transfer.

File transfer method	Procedure
Secure FTP	<ol style="list-style-type: none"> <li>1. Enter the following command: <b>sftp username@scp.oclc.org</b> Replace <b>username</b> with your institution’s assigned username.</li> <li>2. When prompted, enter your assigned password.</li> <li>3. Enter <b>cd slx/out</b> to access the directory for WorldCat Selection export files.</li> <li>4. To retrieve files, enter <b>get *</b>.</li> <li>5. To delete files after retrieving them, enter <b>delete *</b>. <b>Note:</b> To avoid downloading the same files again, be sure to delete files after transferring them. Remember that you can also retrieve export files via the Download Export Files screen. Files are retained for 30 days from date of export on the Download Export Files screen.</li> <li>6. To exit, enter <b>quit</b>.</li> </ol>
FTP	<ol style="list-style-type: none"> <li>1. Enter the following command to access the server: <b>ftp ftp2.oclc.org</b></li> <li>2. Enter your institution’s assigned username.</li> <li>3. When prompted, enter your assigned password.</li> <li>4. Enter <b>cd slx/out</b> to access the directory for WorldCat Selection export files.</li> <li>5. To retrieve files, enter the following sequence of commands: <b>binary</b> (prevents character set translation). <b>prompt.</b> (turns off prompts, allowing you to download all files with one command) <b>mget *</b>.</li> <li>6. To delete files after retrieving them, enter <b>delete *</b>. <b>Note:</b> To avoid downloading the same files again, be sure to delete files after transferring them. Remember that you can also retrieve export files via the Download Export Files screen. Files are retained for 30 days from date of export on the Download Export Files screen.</li> <li>7. To exit, enter <b>quit</b>.</li> </ol>

**Details: export methods**

**Automatic export time.** All automatic exporting occurs nightly at 1:00 am, U. S. Eastern Time.

Method option	Description
Manual	<p>Start each export action via the Selected Items screen. Select categories of records to include and then click <b>Export Selected Records</b>.</p> <p>Maximum flexibility to specify file contents, including options not available via automatic export:</p> <ul style="list-style-type: none"> <li>• Combine records from all vendors in one file</li> <li>• Combine records for all funds in one file</li> <li>• Combine records from one vendor and one fund in a separate file</li> </ul>
Automatic - All records in one file	Creates a single export file that contains all selected records.
Automatic - Separate files per fund	Creates separate export files. Each file contains only records associated with one fund.
Automatic - Separate files per vendor	Creates separate export files. Each file contains only records associated with one fund.

## 6 View history of records loaded

### About the Acquisitions Load History screen

- The load history screen presents a summary of notification records loaded into WorldCat Selection for your institution by your materials vendors.
- The summary covers records added during the most recent 90 days. It is not based on calendar months; rather, it is a 90-day snapshot of record loading.
- The load history is view-only information. No actions are available on this screen.

### Go to the Acquisitions Load History screen

<b>Action</b>
<b>From another tab:</b> Click the Acquisitions tab or press <Alt><Q>.
<b>From another Acquisitions screen:</b> Click <b>History</b> or press <Alt><Y>.

### Information for each record load

Column in file list	Purpose or content
Added	Date when each batch of records was loaded.
Source	Name of the materials vendor that supplied the records.
Records	Number of records loaded.

### Vendor information

Column in file list	Purpose or content
Vendor Name	Lists the materials vendors that your institution is profiled to use with WorldCat Selection.
Vendor Customer ID(s)	Shows the Vendor Customer IDs your institution is profiled to use with each of your materials vendors.

## 7 View selector statistics

### About the Selector Statistics screen

- The statistics screen provides a snapshot of activity for all selectors at your institution. For each selector, the screen shows the number of notification records in each folder.
- Each time you view the screen, the system updates the information with current totals for all selectors' folders.
- Use the statistics to determine how efficiently selectors are processing notifications. For example, you can identify selectors whose Inbox folders contain large numbers of unprocessed records or deferred records. Or, evaluate the statistics to determine whether you need to adjust profiles with some vendors so that selectors receive fewer notifications.
- The statistics are view-only information. You can re-sort the list on any column by clicking the column heading. No other actions are available on this screen.

### Go to the Selector Statistics screen

Action
<b>From another tab:</b> Click the Acquisitions tab or press <Alt><Q>. <b>From another Acquisitions screen:</b> Click <b>Selector Statistics</b> or press <Alt><E>.

### Sort the statistics list

Action
<b>Resort on any column.</b> Click the underlined column heading. <b>Default sort.</b> Sorted by Selector Name. Note: Selector Name sort is based on the first letter of the name, as your administrator entered it on the Users screen. For example, If the administrator entered the names If the administrator entered names beginning with the user's first name, the list is sorted by the first letter of the first name.

## 8 Selection keystrokes

### Browser support for shortcut keys

- In the following tables, most keystrokes for moving between tabs and screens use the <Alt> key with a single letter key (for example, <Alt><L>). Letters are shown as they appear on keyboards, in uppercase.
- **Internet Explorer users.** For <Alt><letter> keystrokes, just press <Alt><letter>.
- **Firefox users.** For <Alt><letter> keystrokes, press <Shift> before the letter key.
- **Example:** To move to the **Searching** tab:
  - In IE, press <Alt><G>.
  - In Firefox, press <Alt><Shift><G>.

### General actions and tab navigation

General action	Keystroke
Open Selection from Connexion welcome screen (click the Selection tab)	<Alt><S> (semicolon)
Log off	<Alt><O>
Help	<Ctrl><Shift><H>
Top/bottom of screen (To first entry field/ To last entry field)	<Ctrl><Home> <Ctrl><End>
Print (Web browser print function; print a record, a folder list, or any screen)	<Ctrl><P>

Move to tab	Keystroke
Searching tab	<Alt><G>
Selector tab	<Alt><L>
Acquisitions tab	<Alt><Q>
Administrator tab	<Alt><A>
Preferences tab (Selector options)	No assigned keystroke
<b>Note:</b> Your view of Selection presents only the tabs you are authorized to use. For example, if yours is a Selector-only authorization, only the Selector and Preferences tabs appear.	

### Selector screens and actions

Selector folder screens	Keystroke
Searching tab	<Alt><G>
Selector tab	<Alt><L>
Inbox	<Alt><I> (from Selector tab)
Selected	<Alt><S> (from Selector tab)
Forwarded to Me	<Alt><M> (from Selector tab)

## Acquisitions Activities

Selector folder screens	Keystroke
Deferred	<Alt><F> (from Selector tab)
Forwarded to Others	<Alt><H> (from Selector tab)
Rejected	<Alt><J> (from Selector tab)
Exported	<Alt><X> (from Selector tab)

Selector action	Keystroke
<b>Actions from a folder list</b>	
View list or records in folder	<PgDn> or <PgUp>
Open record from list	Type item number in box; press <Enter>
E-mail flagged records	No assigned keystroke (click the <b>E-mail</b> button)
<b>Actions from a displayed record</b>	
Select	<Alt><T>
Reject	<Alt><R>
Defer	<Alt><E>
Forward	<Alt><W>
Save	<Alt><V>
Cancel	<Alt><C>
E-mail record	<Alt><M>
Next Record	<Alt><N>
Previous Record	<Alt><P>
Back to List	<Alt><B>

### Acquisitions screens and actions

Acquisitions screen	Keystroke
Acquisitions tab	<Alt><Q>
Selected Items	<Alt><S> (from Acquisitions tab)
Download Export Files	<Alt><P> (from Acquisitions tab)
Selector Statistics	<Alt><E> (from Acquisitions tab)
Acquisitions Load History	<Alt><Y> (from Acquisitions tab)
Export Settings	<Alt><X> (from Acquisitions tab)

Acquisitions action	Keystroke
Export Selected Records	<Alt><X> (from Selected Items screen)
Download (file of exported records)	<Alt><D> (from Download Export Files screen)

## Acquisitions Activities

Acquisitions action	Keystroke
Reset (clear check marks)	<Alt><T> (from Download Export Files screen)
Hide (export file already downloaded)	<Alt><H> (from Download Export Files screen)
Show Hidden Files	<Alt><W> (from Download Export Files screen)
Restore (hidden export file)	<Alt><R> (from Download Export Files screen)

## Administrator screens and actions

Administrator screen	Keystroke
Administrator tab	<Alt><A>
My Institution (Institution Detail)	<Alt><M> (from Administrator tab)
Institution Users	<Alt><U> (from Administrator tab)
Summary of Selector Distribution and exclusion criteria (administrator view)	Click the <b>Distribution</b> button in a Users list entry for a selector (on Institution Users screen)
Institution Funds	<Alt><D> (from Administrator tab)
Institution Locations	<Alt><T> (from Administrator tab)
Collection Areas	<Alt><S> (from Administrator tab)
Record Distribution	<Alt><B> (from Administrator tab)
Call Number Priority	<Alt><1> (from Record Distribution screen)
Call Number Ranges	<Alt><2> (from Record Distribution screen)
Keywords or Phrases	<Alt><3> (from Record Distribution screen)
Language	<Alt><4> (from Record Distribution screen)
Country	<Alt><5> (from Record Distribution screen)
Date or Date Range	<Alt><6> (from Record Distribution screen)
Government Publication type	<Alt><7> (from Record Distribution screen)
Material Type	<Alt><8> (from Record Distribution screen)

Administrator action	Keystroke
Save	<Alt><V>

## Acquisitions Activities

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<b>Administrator action</b>	<b>Keystroke</b>
Cancel	<Alt><C>
Next User (User Detail screen)	<Alt><N>
Previous User (User Detail screen)	<Alt><P>
Back to User List (User Detail screen)	<Alt><B>
Next Area (Collection Area Summary)	<Alt><N>
Previous Area (Collection Area Summary)	<Alt><P>
Back to Collection Area List (Collection Area Summary)	<Alt><B>

### Preferences screens and actions (for selectors)

<b>Preferences screen</b>	<b>Keystroke</b>
Preferences tab	No assigned keystroke
Selector Preferences	<Alt><S> (from Preferences tab)
Reject if already held	<Alt><H> (from Preferences screen)
Reject if selected by another selector	<Alt><B> (from Preferences screen)
Selector Excludes	<Alt><E> (from Preferences tab)
Selector Distribution	<Alt><D> (from Preferences tab)

