

Selection Quick Reference: Acquisitions Activities

Access WorldCat Selection

	Action
1	Point your browser to the OCLC Connexion service: < http://connexion.oclc.org >.
2	At the Connexion login screen, enter a WorldCat Selection authorization and password. Click Logon or press <Enter>.
3	At the Connexion welcome screen, click the Selection tab. Or press <Alt><;> (semicolon). Result: WorldCat Selection opens in a new window. The Connexion session remains active until you close it or an inactivity timeout occurs. Log off Selection: Click Logoff or press <Alt><O>.

Export Selected Items

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

Note: You can group records for export **by vendor** or **by fund** or **by vendor and fund**.

	Action
1	Go to the Selected Items screen: From another tab: Click the Acquisitions tab or press <Alt><Q>. From another Acquisitions screen: Click Selected Items or press <Alt><S>. Note: The Acquisitions tab displays only if you logged on with an authorization that includes acquisitions-level capabilities.
2	Review the summary of record distribution. Record totals are shown by Fund , by Source (vendor) , and by Selector .

	Action
3	<p>Specify records to export All selected records (default setting)</p> <p>If the check box labeled Export All Vendors and Funds is empty, click to place a check mark in the box.</p> <p>Records grouped by vendor or fund</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>Records grouped by vendor and fund</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>
4	<p>Click Export Selected Records or press <Alt><X>.</p> <p>Results:</p> <p>The system exports all selected records or a specified group of records to an online file at OCLC or to both an online file and to your institution's folder on an OCLC FTP server. Each export action creates one 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 one export file.</p> <p>All records: 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>Specified group(s) of records 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>

Download Export Files

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 for download 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.

Action	
1	Go to the Download Export Files screen: From another tab: Click the Acquisitions tab or press <Alt><Q>. From another Acquisitions screen: Click Download Export Files 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. Download multiple files: You can download two or more files at once. Before sending the files to the browser, the system creates one file that contains records from all selected export files.
3	When finished choosing files, click Download or press <Alt><D>.
4	The downloading process varies slightly depending on which browser you use. • Internet Explorer. In the File Download dialog box, select Save or press <Enter>. • Netscape Navigator. In the Unknown File Type dialog box, click Save File .
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 (defined by your administrator) or enter a new name.
6	• Click Save or press <Enter>. • Click Close or press <Enter> to close the Download Complete message box.
7	Next steps: 1 Import the file of records to your local system (ILS). 2 Within your ILS, make any necessary changes to the records and then order the selected materials.

Manage export files

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.
Created	Date and time when the file was created.
Bytes	Size of file in kilobytes.
Records	Number of records in the file.
Downloaded	Date and time when the file was first downloaded. Shows Not Downloaded for a file not yet downloaded. Shows Delivered via FTP 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 or Funds	Identifies the vendor(s) or fund(s) associated with the records in each export file. Note: Vendors or funds are listed only if you exported records for specific vendor(s) or fund(s).
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.
Appears when you click Show Hidden Files to view a list containing files previously hidden.	

Actions available for export files

Action	Procedure
Download an export file	Select the check box for the file and click Download or press <Alt><D>.
Hide downloaded file	Select the check box for a previously downloaded file and click Hide or press <Alt><H>. Note: You can hide a file for which Delivered via FTP appears in the Downloaded column, even if you have not downloaded the file.
Show hidden file	Click Show Hidden Files or press <Alt><W>.

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Action	Procedure
Restore hidden file to list	<ol style="list-style-type: none"> 1 Click Show Hidden Files or press <Alt><W>. 2 Select the check box for a hidden file and click Restore or press <Alt><R>.
Clear all check boxes	Click Reset or press <Alt><T>.

Select 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	Procedure
1	<p>In the Export Delivery area, specify your preferred location for file delivery:</p> <p>Online (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>FTP and Online</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 Delivered via FTP.</p>
2	Click Save or press <Alt><V>.

Select export method

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

Details: file delivery options

Delivery option	Description
Online	<p>Default option</p> <p>File access. Export files, whether created manually or automatically, are stored online at OCLC and are available for download from the Download Export Files screen.</p> <p>Retention. 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.</p> <p>File access. 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.</p> <p>For details on the transferring files, see Details: FTP file transfer methods</p> <p>Retention. On the FTP site, files are retained for 90 days from the date of export.</p> <p>File names. Names of files on the FTP server begin with a fund code, a vendor name, or the text AllVendors. 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:</p> <p style="padding-left: 40px;">AllVendors.D20091130.T174310.dat JBF1.D20100215.T043548.dat</p> <p>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 Delivered via FTP.</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"> Enter the following command: sftp username@scp.oclc.org Replace username with your institution's assigned username. When prompted, enter your assigned password. Enter cd slx/out to access the directory for WorldCat Selection export files. To retrieve files, enter get *. To delete files after retrieving them, enter delete *. <p>Note: 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.</p> <ol style="list-style-type: none"> To exit, enter quit.
FTP	<ol style="list-style-type: none"> Enter the following command to access the server: ftp ftp2.oclc.org Enter your institution's assigned username. When prompted, enter your assigned password. Enter cd slx/out to access the directory for WorldCat Selection export files. To retrieve files, enter the following sequence of commands: binary (prevents character set translation). prompt. (turns off prompts, allowing you to download all files with one command) mget *. To delete files after retrieving them, enter delete *. <p>Note: 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.</p> <ol style="list-style-type: none"> To exit, enter quit.

Details: export methods

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

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Method option	Description
Manual	<p>Start each export action via the Selected Items screen. Select categories of records to include and then click Export Selected Records.</p> <p>Maximum flexibility to specify file contents, including options not available via automatic export:</p> <ul style="list-style-type: none"> Combine records from all vendors in one file Combine records for all funds in one file Combine records from one vendor and one fund in a separate file <p>For details on using the Selected Items screen, see Export selected items</p>
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.

View Load History

- 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 screen also lists your vendors, and the Customer IDs each vendor uses to identify records for your institution.
- The load history is view-only information.

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

Information for each record load

Column in file list	Purpose or content
Added	Date when each batch of records was loaded.

Column in file list	Purpose or content
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.

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

Sort the statistics list

Action
<p>Resort on any column. Click the underlined column heading.</p> <p>Default sort. Sorted by Selector Name.</p> <p>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 names beginning with the user's first name, the list is sorted by the first letter of the first name.</p>

Support

Contact OCLC

Phone: (support in English, Spanish and Portuguese).

Hours: 7:00 am—9:00 pm U.S. Eastern time, Monday-Friday.

USA: 1-800-848-5800

International: 1-614-793-8682

Fax: 1-614-764-2694

E-mail: connexion-support@oclc.org

Web: <https://www3.oclc.org/app/contact/>