

OCLC eSerials Holdings Service

Ordering Guide



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eSerials Holdings Service Ordering Guide

This guide describes the information needed to order the OCLC® eSerials Holdings service for your library. Use this guide with the *OCLC eSerials Holdings Service Ordering Checklist*. Read this guide and write down the information that you need on the checklist.

The *Ordering Checklist* is available at <http://www.oclc.org/support/documentation/esholdings/ordering/Checklist.pdf>

Ordering

After you complete the checklist, submit your order online through the OCLC Online Service Center at <http://www.oclc.org/servicecenter/>.

Or, complete the PDF order form at <http://www.oclc.org/support/forms/pdf/eshord.pdf>, print it, and mail it to the address on the form.

This guide assumes that you will place your order through the Online Service Center. However, this guide and the checklist also help you complete the PDF order form.

When OCLC processes your order, you (or the person you selected as your library's eSerials Holdings contact) receive an e-mail *Welcome* message that confirms your order, reminds you to discuss the service with your ILL department, and provides information you need if you request support.

Support

For help with your order, contact:

- OCLC Customer Support Department
 - E-mail: support@oclc.org
 - Phone: 1-800-848-5800 (USA)
1-614-793-8682
 - Online [Support Form](https://www3.oclc.org/app/contact/) at: <https://www3.oclc.org/app/contact/>

Cancel or change

If your library already uses the eSerials Holdings service, you can cancel or change the service through the Online Service Center. It lets you can change your library's contact person for the service or the method that you use to contribute your holdings data.

If you prefer not to use the Online Service Center, you can send a message to orders@oclc.org to cancel the service. Or, you can send a message to support@oclc.org to change your contact person or data contribution method.

Before You Log On

The eSerials Holdings service automates the process of setting and maintaining your holdings for ISSN-based electronic serials in WorldCat without adding to your cataloging workload.

To order the service, you need an account at the Online Service Center for your OCLC symbol. If you do not already have an account, you can create one at the Center. Each account has a user ID and password that differ from the authorization and password used to access OCLC Resource Sharing, Cataloging or FirstSearch.

If your institution has multiple OCLC symbols, order the eSerials Holdings service for each symbol for which you want to set holdings. To do that, you need an account for each of those symbols at the Online Service Center.

Enter here (optional) and on the *Checklist*:

The OCLC symbol for which you want to order: _____

Your Online Service Center User ID for that symbol: _____

Your Online Service Center Password for that symbol: _____

Log On and Begin to Order

To log on to the Online Service Center, or create an account, and begin to order:

	Action
1	Go to the Online Service Center at http://www.oclc.org/servicecenter/default.htm
2	Click Log on and log on if you already have an Online Service Center account. Otherwise, click Create an account and follow the instructions to create an institution account for yourself.
3	Click Order OCLC products and services on the Welcome page.
4	Click OCLC services on the next page.
5	Click the Order button for the eSerials Holdings service.
6	Use the <i>Checklist</i> and the information in this guide to complete your order.

Part 1: Who is your eSerials Holdings contact?

Make sure that the institution name and OCLC symbol shown under *Institution information* are correct. (If they are **not** correct, click the **Cancel** button and log off. Then log on to an Online Service Center account for the correct OCLC symbol.)

From the drop-down list, select yourself or someone else to be your library's eSerials Holdings contact. Or, add a new contact in the area below the drop-down list.

New contact: enter here (optional) and on the *Checklist*:

E-mail: _____

First name: _____

Last name: _____

Phone number: _____

Part 2: How would you like to contribute your holdings data?

You may contribute your holdings data in a number of ways, depending upon your library's current arrangements (if any) with serials management services.

Once you have determined what is best for your library, enter your choices on the *Checklist*.

My serials management service

If your serials management service is listed below, it can contribute your holdings on your behalf at no additional cost to you.

Important: You must have an established subscription with a serials management service and be using its services before you order the eSerials Holdings service.

- EBSCO
- Serials Solutions
- TDNet
- WorldCat Link Manager

My library

Or, your library can supply its holdings data directly to OCLC using one of the following formats:

- Tab-delimited
- Google Scholar

See [Holdings options](#) for file specifications.

Part 3: Holdings options

Option 1: Serials management service

Automatic notification. If your serials management service is listed below, OCLC will notify it of your subscription to the eSerials Holdings service. You do not need to notify it yourself.

- EBSCO
- TDNet
- WorldCat Link Manager

Service site. If your serials management service is listed below, you need to notify it through its Web site. After you submit your eSerials Holdings service order, you can click a link to its site so you can log on and provide the information it needs.

- Serials Solutions

Option 2: My Library

If your library submits the eSerials holdings data directly to OCLC, it must be your library's **own** data generated by your library's **own** system. OCLC will **not** accept data previously generated by a partner service.

In order to supply your holdings data to OCLC, you may submit a tab-delimited or Google Scholar format data file. In your order, you indicate which data file format you will use and how OCLC will receive the data file:

- You can FTP your data file to OCLC via the EDX service if you use the tab-delimited or the Google Scholar format.
- Or, OCLC can harvest (transfer) your holdings directly from your server if you use the Google Scholar format.

Tab-delimited format.

If you submit a tab-delimited file, you must submit it via the OCLC EDX service.

Tab-delimited File Specification	
File	
	Submitted <i>files</i> may not contain a header.
Record	
	Each <i>record</i> shall consist of one line.
	Each <i>record</i> shall contain two fields in the following order: 1. ISSN 2. Title
	The <i>record separator</i> may consist of: <ul style="list-style-type: none">• A line feed (ASCII/LF=0x0A), or• A carriage return and line feed pair (ASCII/CRLF=0x0D 0x0A)
Field	
	Each <i>field</i> must be followed by a single tab character: ASCII/LF=0x09.
	All content present beyond the 2nd tab character is ignored.
	Field content is optional; one or both fields may be empty. ASCII/0x09 0x09 0x0A would be an empty record.
	Fields may not contain a line break (ASCII/0D0A) embedded within or between fields.
	Field data will be mapped without validation; no allowance is made for: <ul style="list-style-type: none">• Adding or deleting leading/trailing spaces• Removing single or double quotation marks (curly or straight)

Google Scholar format.

If you submit a Google Scholar format file, you may submit it via the OCLC EDX service or OCLC can harvest (transfer) the file from your server once a month.

The XML Specification for the Google Scholar format is found at http://scholar.google.com/intl/en/scholar/institutional_holdings.xml.

OCLC extracts data from the <title></title> and <issn></issn> elements only. Additional elements may be used in the future.

Information about Google Scholar is available at <http://scholar.google.com/scholar/libraries.html>.

Part 4: WorldCat Resource Sharing options for eSerials

Including your eSerials holdings in WorldCat informs ILL librarians from your library and colleagues throughout the OCLC membership of those serial publications you hold that are available electronically.

Requests for copies of these materials from other libraries will increase. Your ability to fill these requests depends on your local ILL policies and your agreements with your content providers.

You have the option to have WorldCat Resource Sharing automatically deflect eSerials requests to the next library in the lender string by setting your preferences in the **OCLC Policies Directory**. You may also customize the policy to deflect or not deflect requests from libraries within an existing group.

The Online Service Center order form provides three options related to your library's preferences for deflecting or not deflecting eSerials requests. You may want to discuss the options with your ILL department and review your current preferences. If necessary, your library can always change its preferences at a later date in the OCLC Policies Directory.

For more information, see [Library deflection](http://www.oclc.org/nextspace/005/tipsandtricks.htm) at <http://www.oclc.org/nextspace/005/tipsandtricks.htm>.

Option 1: Take me to Policies Directory

Select option 1 if you want to change your preferences in the OCLC Policies Directory during the order process for the eSerials Holdings service.

If you select this option and click **Continue**, the OCLC Policies Directory logon page appears. Then you can log on, set your preferences, exit the Policies Directory, and click **Continue**.

To log on to the Policies Directory, use an authorization and password for WorldCat Resource Sharing.

Enter here (optional) and on the Checklist:

Authorization: _____

Password: _____

Option 2: Keep our current preferences

Select option 2 and click **Continue** if you do **not** want to change your preferences in the OCLC Policies Directory as part of order process for the eSerials Holdings service **because you are satisfied with your current preferences**.

Note: Although the text of option 2 is "I want to accept all borrowing requests for my eSerials titles," selecting this option will not change your library's preferences even if you currently deflect eSerials requests.

Option 3: We will set our preferences later

Select option 3 and click **Continue** if you do **not** want to change your preferences in the OCLC Policies Directory as part of the order process for the eSerials Holdings service **because you are not ready to make a decision about borrowing requests for eSerials**.

Part 5: Review your order

Please verify that all your order information is correct. If you want to:

- Change your order: Click the **Back** button to return to the appropriate page, make your changes, then continue the order process.
- Cancel the entire order: Click the **Cancel** button; you are returned to the Online Service Center home page.
- Suspend work on your order: Click the **Save Cart for Later** button; your order is added to your institution's saved orders.

To return to the order in the Online Service Center, click the **Saved Orders** link (on the right side of the Welcome page or Manage My Institution Information page) and then click the **Checkout** button.

- Submit your order: Click the **I Accept** button and then click the **Submit Order** button. The Receipt page appears.

Part 6: Receipt

The Receipt page is your record of your order.

Serials management service authorization

If your serials management service is listed below and you selected it to send your holdings to OCLC, you must provide some information that it needs before it will begin to send your holdings. (If your serials management service is **not** listed, no further information is needed.)

- Serials Solutions

The *Finalize your order* area at the top of the Receipt page contains a link to your serials management service's login page. When you click the link, the page opens in a separate window. Log in to its site and follow the directions to authorize it to send your holdings to the OCLC eSerials Holdings Service. When you finish, exit the site and close the window.

Enter here (optional) and on the *Checklist*:

Your serials management service login/
account: _____

Password: _____

Now what?

You have completed ordering the eSerials Holdings service for your library.

You may want to print the Receipt page for your records.

And you may select any of the activities shown under *What else can I do now?*