Selector Activities

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Revision History

Date	Section title	Description of changes
June 2009	3. View and manage records; 4. View and use records	Updated to cover new ability to retain copies of forwarded records in the Forwarded to Others folder, and to see specofoc institution symbols under which items are held.
	5. Search records	Added the new Forwarded to Others folder to the list of searchable folders.
	6. Preferences	Updated information on the Reject if Held action to cover its functionality when records may be held under any of multiple OCLC symbols.
	9. Keystrokes	Added keystroke for access to the new Forwarded to Others folder.
January 2010	3. View and manage records; 4. View and use records	Updated to cover new ability to send a single record or a group of flagged records via e-mail..
	6. Preferences	Updated to add new preference option for a default Sender E-mail Address, to be inserted in messages that contain copies of notification records.
	9. Keystrokes	Added keystroke for the new E-mail action..

Table of Contents

1 Access WorldCat Selection

Log on to 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>. **Note:** 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 **Selection** tab. Or press <Alt><;> (semicolon). **Result:** • A new window opens for the WorldCat Selection session. • 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 **Logoff** (top right) or press <Alt><L>. Or close the browser window for the Connexion session. **Note:** 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: • View notification records routed to you. • Modify records to specify fund, location, price, and ISBN order; selector can also enter notes. (Other record content is read-only.) • Take actions on notification records to select titles, reject them, defer a decision (and indicate a reason), or forward a record to another selector. Preferences tab: Use Selector Preferences to customize presentation of lists of notifications.
Acquisitions	Acquisitions tab: • View a summary of all records currently selected by all selectors at your institution. • Export all selected records. • Download files of exported records and load the records into your ILS. • View a history of records loaded into Selection for your institution during the last 30 days.
Administrator	Administrator tab: Establish institution settings: Examples include: • User names and their aliases • Fund codes and descriptions • Location codes and descriptions • User-specified note fields: labels, possible values, mapping to exported records • Enable system to identify subject areas of titles (by call number range or keywords) and route notifications to assigned selectors **Note:** 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.

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	1. Type an authorization number (required). 2. Type a password (optional). If you prefer to enter the password each time you log on, leave the Password box empty. 3. In the Name box, type an identifier (up to 8 characters) for the authorization/password combination (optional). 4. In the Dewey-Only box, for a Selection authorization type **N** (required). 5. **Set as default authorization.** Click to select the **Default** option button for the authorization you entered. Or select **No Default Authorization**. 6. When finished, click **Save Settings**. Then click **OK**.
Save multiple authorizations	1. For each entry, — Type an authorization number (required). — Type a password (optional). If you prefer to enter the password each time you log on, leave the Password box empty. — In the Name box, type an identifier (up to 8 characters) for the authorization/password combination (optional). — In the Dewey-Only box, type **Y** or **N** (required). 2. Repeat step 1 to add another entry. 3. **Set a default authorization (optional).** Click to select the Default option button for the authorization you want to use. Or select **No Default Authorization**. 4. When finished, click **Save Settings**. Then click **OK**.
View list of saved authorizations and names	1. On the logon screen, open the Choices list and click the **last** item, **More Details**. 2. In the Authorization List window, click an authorization number to select it. Or click **Close Window** to return to the login screen. **Results** When you click an authorization number, the Authorization List window closes and the selected authorization appears on the login screen, ready for use.

To do this	Procedure
No default authorization	1. Click to select the option button for **No Default Authorization.** 2. **(Optional) Default Dewey-Only logon.** To set the Dewey-Only Session logon screen as the default, change the Dewey-Only setting to **Y**. 3. Click **Save Settings**. Then click **OK**.
Save new or changed settings	Click **Save Settings**. **Results** • The system displays a confirmation message. • When you click **OK**, the Local Browser Settings window closes.
Undo changes, restore previously saved settings	Click **Reset**. **Results** • The system cancels any changes you made since you opened the Local Browser Settings window. • Settings previously saved (if any) appear on the screen. Or the system restores the original system defaults (all text removed, no default authorization).
Restore system defaults (delete all entries)	1. Click **System Defaults**. 2. Click **OK** to confirm that you want to erase all saved authorizations/passwords and set Dewey-Only options to **No**. **Results** • Authorization numbers, passwords, and Dewey-Only settings are removed. • **No Default Authorization** is selected, with Dewey-Only set to **No**.

Log off Selection (end session)

Action
Click **Logoff** or press <Alt><O>. The system ends your session. When you log off, Selection automatically saves and closes any open records. **Note: Connexion window.** 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.

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 **Forward** 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 **Reject** action.	Records move from Inbox to Rejected folder.

Done by	Action	Results/Notes
Selector	Defer a decision on records. Choose a reason for the deferral. Then take the **Defer** 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 **Select** 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 **Export Selected Records**.	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 **Download**. 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 View and manage records

Selector Inbox and related folders

The Selector tab lets you view and act on records you receive from vendors or from colleagues. You can access the records until they are deleted from the system. (For more on record retention, see the Details section in this topic.)

- **Inbox:** Lists records describing items for your consideration. Records arrive in the Inbox when the vendor notifies you that a title is available. If you are the default selector for your library, you also receive records the system cannot automatically route to a specific selector.
- From the Inbox, you can select a record, reject it, defer a decision, or forward it to another selector.
- **Forwarded to Me:** Lists records forwarded to you by another selector at your library. As in the Inbox, available actions are: select, reject, defer, and forward.
- Records you act on move from the Inbox to another folder based on the action taken: Selected, Deferred, Forwarded to Others, or Rejected. You can access Selected records and take further action on them until they are exported by Acquisitions staff (records in the Exported folder are read-only). Deferred, Forwarded to Others, or Rejected records remain accessible until automatically deleted from the system.
- Records you forward to another selector move to the receiver's Forwarded to Me folder. A copy of each forwarded record moves to your Forwarded to Others folder. To edit or take action on a forwarded record, retrieve it from the Forwarded to Others folder.

View the list and records

View	Procedure
All records on current screen	**Top or bottom of the screen.** Press <Ctrl><PgUp> or <Ctrl><PgDn>. **Up or down on the screen.** Press <PgUp> or <PgDn>. Or Use the scroll bar (right side of screen). Or Turn the scroll wheel on your mouse.
Multipage list Next screen or previous screen First or last screen Specific page number	For multipage folder lists, a **(Page _ of _)** indicator appears with the folder name to show the current page number and the total number of pages. At the bottom of each screen, a row of buttons lets you jump to the first, last, previous, or next screen of the list, move forward or back ten pages, or click the number of the page you want to view.
Full record	Click the entry number. Or Type the entry number in the Record box and press <Enter>.

View	Procedure
Print record or list	Display the screen you want to print. In your Web browser, on the File menu, click **Print**. Or press <Ctrl><P>.

Send flagged records via e-mail

Use the E-mail action to send one or more notification records to anyone you need to consult when selecting items for purchase, such as a faculty member, collection developer, or subject specialist.
You can send up to 250 flagged records in each e-mail message.

	Action
1	Display the folder list that includes the records to send via e-mail.
2	Flag (mark) the record(s) to include in the e-mail message. **Flag:** Click the check box next to the item number. **Unflag:** Click the box again to remove the check mark. **Flag all:** Click the check box above or below the item number column. **Unflag all:** Click the box again to remove all check marks. **Note:** You can flag up to 250 records.
3	Click the **E-mail** button (top right).
4	In the **Send Record via E-mail** dialog, enter e-mail addresses for people you want to receive the records you are sending. You can include up to five e-mail addresses. E-mail addresses are limited to 40 characters. **Note:** The system does not remember the addresses you enter for future messages. However, the browser can complete previously used addresses after you type the first few characters.
5	The **Include Me** option is selected by default; the system sends a copy of the message to your e-mail address. If you prefer not to receive a copy of the message, clear the check box. **Note:** If you clear the **Include Me** option, you do not receive a copy of the current message. However, the next time you take the E-mail action, the default setting (Include Me selected) is restored. You cannot change the default.
6	The Sender Name and Sender E-mail boxes already contain your name (as used within WorldCat Selection) and your e-mail address (as you entered it in your Preferences). **Note:** You **cannot** change the system-supplied Sender Name in the E-mail dialog. Administrator privileges are required to change the system name for a user. You can change the return e-mail address shown in the dialog. However, the changed address is used only once: in the current message. The next time you use the E-mail action, the dialog contains the default Return Address you entered in Preferences.
7	**(Optional)** In the Additional Notes area, type any queries, explanations, or other notes you want to include in the message. You can enter up to 500 characters in the text box.

	Action
8	Review the message and make corrections or additions, if needed.
9	Click **E-mail** (or press <Alt><M>) to send the message including the notification records you flagged. Or Click **Cancel** to discard the message and close the Send Record via E-mail dialog. **Result:** The system sends the message to the specified recipients. The dialog closes and the system redisplays the folder list from which you flagged records to send via e-mail. The confirmation message **E-mail successfully sent** appears in a gray information bar at the top of the folder list. **Note:** The e-mail message includes the number of attached records in the Additional Notes section. Records are separated by a single line followed by a record number.

Take actions on records from a list

Note: Actions you can take on records depend on which folder contains the records:

- Inbox, Forwarded to Me, Deferred, Forwarded to Others: All actions
- Selected, Rejected: All except the action already taken
- Exported: No actions

	Action
1	Display the folder list that includes the records on which to take action.
2	Flag (mark) the record(s) to process. **Flag:** Click the check box next to the item number. **Unflag:** Click the box again to remove the check mark. **Flag all:** Click the check box above or below the item number column. **Unflag all:** Click the box again to remove all check marks.
3	**Optional.** To specify or change the Fund or Location assigned to records, in the Fund or Location list, select the fund/location you want to use. **Note: Fund list and/or Location list not shown** If your administrator has not defined any funds and/or locations for your institution, these lists are not shown.

	Action
4	To Forward records, in the Forward To list, click the name of the selector you want to receive the record(s). **(Required)** To Defer records, you can specify a reason for deferring. In the Deferred Reason list, click the reason you want. **(Optional)**
5	On the Action list, click **Select**, **Reject**, **Defer**, or **Forward**. **Results** • Status of the flagged records changes from **Inbox** to Selected, Rejected, Deferred, or Forwarded to Others. • Selection adds the records to the folder that contains records with the new status. • The Inbox list is refreshed. Processed records are removed. If you had re-sorted the list by clicking a column heading, the re-sorted order is not retained. The refreshed list is based on the default sort specified in Preferences. • Records forwarded to another selector move to the Forwarded to Me folder for that selector. Copies of forwarded records move to your Forwarded to Others folder. • For Deferred records, the Deferred folder includes a column to show the reason for deferral, if you specified a reason.

Note: Fund and/or Location required on Select action
Administrators can require selectors to specify a Fund and/or a Location before taking the Select action.
Single record. If this requirement is in effect, and you attempt to select a record without the required Fund/Location value(s), an error message alerts you to the missing information and the Select action fails.
Flagged records on a list. If you take the Select action on multiple flagged records, records missing the required Fund/Location are unflagged and the Select action fails. Other records remain flagged, but not selected. After supplying the required Fund/Location in the unflagged records, and then reflagging them, repeat the Select action.

Customize the list

Customize	Procedure
Columns included	To show specific columns only, use the row of check boxes at the bottom of the screen. **Hide a column:** Click the box for that column to remove the check mark. **Show a hidden column:** Click an empty box to restore the check mark. **Note:** You cannot hide the Title column. **Default:** Show all columns.
Records per screen	Use the Records per Screen option (at the bottom of any list screen) to choose the number of records to show on each screen of a folder list. In the **Records per Screen** list, click **1000** or **250** or **100** or **25**. **Default:** 25 records per screen.

Customize	Procedure
Record sorting	**Change sort:** Click a column heading to re-sort the list on that column. All records in the folder (not just those on shown on the current screen of the list) are re-sorted. **Default:** By default, Selection sorts records in descending order by the date the record arrived in the list (shown in the **Added** column). The default secondary sort order sorts records in ascending order by Source (vendor). **Tip: Change default sort.** On the Selector Preferences screen, you can specify a new default sort order (primary and secondary sort). Selection uses your preferred order automatically until you change it. **Default sort restored after action from list.** When you take an action on records from a list, the default sort (as defined in Preferences) is restored.
Record data shown	To show all available data in all columns, at the bottom of the screen, in the **Data Values** list, click **Show All Data**. **Truncate list data:** In the **Data Values** list, click **Truncate Data**. **Default:** In each column, a system-defined number of characters appears. The default varies as appropriate for the type of data displayed in each column.

Details: Inbox and related folders

About	Notes
Maximum records	Each folder can display up to 1000 entries for records. Once 1000 entries are displayed, additional records are listed only after you take action on current records. Taking an action moves the records to other folders. **Note: List shows 1000 records most recently added.** The system always displays the newest 1000 records added to the system. Which records appear is not based on the default sort. Rather, the system first displays the newest 1000 records in the file, and then sorts the records using the default sort criteria.

<table>
<tr><th>About</th><th>Notes</th></tr>
<tr><td>Moving between pages in a multipage list</td><td>Re-sorting sorts all pages of the list. Re-sorting the list by clicking a column heading sorts all records in the folder (up to 1000), not just records shown on the current page. After you re-sort the list, all pages are refreshed to show all records in sequence based on the new sort.
Page position retained after action. If you take an action on a record from a list, the list is refreshed and you remain on the page from which you took the action. For example, you might go to page five (showing record 101 at the top), flag 10 records and then take the Select action. After the list is refreshed, you remain on page five. The ten entries you flagged are removed, and ten entries from the next page are now displayed.
Records remain flagged when you view other pages without taking an action. If you flag records on screen one of a list, move to screen five, and then go back, records on screen one remain flagged.
Flagged record actions affect records on the current page only. For example, if you flag ten records on page four and then move to page nine, flag three records on page nine, and then take the Select action from page nine, the records on page four are not selected and are no longer flagged. You cannot act on those records unless you first return to page four and reflag the records.</td></tr>
<tr><td>Record retention</td><td>How long records remain in a folder depends on whether your administrator has set a limit other than the system default.

Automatic record deletion For each folder, the system specifies a default number of days to retain records. Administrators can specify limits (within a system-defined range) for all folders.</td></tr>
</table>

About	Notes
Refreshing record lists	The list of records is refreshed when you: • Take an action (Select, Reject, Defer, Forward) on one or more records from the list. • Take an action (Select, Reject, Defer, Forward) on a single record while viewing the full record. • Customize the list (for example: re-sort the items, turn data truncation on or off, add or remove columns). • Switch to another folder or return to the current folder from viewing records, if you click the folder name on the navigation bar (or use the assigned keystroke). One entry is updated, but the list is **not** refreshed • When you edit a record, save the record, and then click **Back to List** (or press <Alt><B>) to return to the list. That is, you modify the record but do not take an action on it. The list is **not** refreshed when you: • View a record and click **Back to List** (or press <Alt><B>) to return to the list. • View several records without returning to the list. • Edit an open record, cancel changes, and then click **Back to List** (or press <Alt><B>) to return to the list. Results of refreshing the list: • Flags (check marks) are cleared. • Changes to list display (columns, sorting, etc.) take effect. • Records move from or appear in the current folder as the result of actions.

Details: List columns

Column	Description	Source	Length (default if truncated)
Added	Date added	System defined	8 characters (yyyymmdd)
Source	Vendor name	System defined	20 characters
Held	If held, contains all OCLC institution symbol(s) under which the library holds the item. Blank if not held	Institution’s holdings in WorldCat	No default length
All	Total holdings	Holdings for this record in WorldCat	4 characters
Author	Personal or corporate/ conference author	1xx field, all subfields, from record. If record has no 1xx fields, uses the first 7xx field	20 characters

Column	Description	Source	Length (default if truncated)
Title	Title of work, from record	245 field, subfields abfghknp	30 characters
Publisher	Publisher of work	Field 260b, 261b, or 262b from record	20 characters
Date	Date (year) of publication	Fixed field Date1 from record	4 characters
Call Number	Classification number. First occurrence in record, based on priority set by administrator	Field 050, 055, 060, 070, 082, 086, 090, 092, or 096; all subfields	10 characters
Fund	Fund description from record	Fund specified by selector	20 characters
Deferred Reason (Deferred folder only)	If specified, indicates why you deferred action on the record. (Defining a reason is optional) **Change assigned reason.** If appropriate, you can change the reason assigned to a record or a group of records. Flag the record(s) on the Deferred list and then choose a new reason from the Deferred Reason list box. Then take the Defer action to assign the new reason.	Text supplied by user	40 characters
Forwarded From (Forwarded to Me folder only)	Name of the person who forwarded the record to you	Name from user list defined by administrator	20 characters

Details: Remove duplicate records

- Your administrator can use an option to remove duplicate copies of notification records received from multiple vendors from Inbox folders for all selectors at your institution.
- The administrator can choose to remove duplicates based on the date added (keeping the first record received) or based on a priority the administrator assigns to the vendor.
- By default, the option is **off**. The system keeps all copies of records.
- If your administrator chooses to keep the first record received, the system deletes a newly added record that duplicates one previously distributed to the same selector.

- If your administrator chooses to keep records based on vendor priority, a record from a high-priority vendor remains in your Inbox, but the system removes duplicate copies received from lower-priority vendors. Conversely, the system removes a record from a low-priority vendor if you receive a duplicate record from a higher-priority vendor.
- When duplicate removal is **on**, a daily process identifies duplicate records in each Inbox and deletes the records. The process scans other folders (Forwarded To Me, Forwarded to Others, Deferred, Selected, and Exported) to determine if a record in the Inbox duplicates a record previously received. However, records are deleted from the **Inbox only**. Records in other folders are **never** removed. For example, when duplicate removal is based on vendor priority, if the new record in the Inbox is from a higher-priority vendor than a record in the Deferred folder, the Deferred record is not deleted. However, if both copies are in the Inbox, the lower-priority record is deleted. Similarly, when duplicate removal is set to keep only the first-received record for a title, and you deferred action on the first copy you received, the system removes any newly distributed copy that arrives in your Inbox.
- The removal process typically runs **after** new vendor records are loaded and distributed. When you log in each day, any duplicate records have been deleted. If additional vendor records load after the process runs.these records are checked for duplicates the next time the daily process runs.
- **Note: Duplicate removal scans deleted records.** To identify duplicate titles, the system scans records deleted from your folders during the last 365 days.

4 View and use notification records

About notification records

- Each record combines the following information about one notification item:
  - —Institution-specific information, including the fund, location, and other data based on customization done by your system administrator and/or by you.
  - —Bibliographic information (author, title, publisher, etc.) from the WorldCat record.
  - —Vendor-specific information.
  - —Custom note fields defined by your institution administrator.
  - —Selectors who received copies of this record, and any actions they have taken on the record.
- The following information may appear if appropriate:
  - —**Records distributed to other selectors.** An indicator (small yellow diamond symbol) appears at the end of the holdings statement at the top of the full record. Hover the mouse pointer over the symbol to see a message alerting you that at least one other selector **at your institution** received the record. Move to the bottom of the record screen to view names of other selectors and determine whether they have acted on the record. The list gives the name of each selector's institution; if your library uses Selection as part of a library group, selectors at other institutions in the group may be listed.
  - —**Records forwarded to/from other selectors.** An indicator (small yellow diamond symbol) appears at the end of the holdings statement at the top of the full record. Move to the bottom of the record screen to view names of other selectors to whom you forwarded records and/or selectors who forwarded records to you. Use the list to determine whether the other selectors have acted on the records. If your library uses Selection as part of a library group, selectors at other institutions in the group may be listed.
  - —**Default selector only: distribution status.** If you are the default selector, you can determine why the record came to you. The last line of the vendor information area contains the record's distribution status. The text indicates that (1) the record did not match any collection areas defined by your administrator, or (2) all selectors excluded the record.
  - —**Forwarded to Me records: name of person forwarding the record.** Records in the Forwarded to Me folder identify the person who forwarded the record to you. The label **Forwarded From**, followed by the name, appears at the top left, below the holdings statement.
- You can change the institution-supplied data. Other content is read-only.
- You can take the following actions on a record: save or cancel changes; select, reject, forward to another selector, defer a decision, or output a text-only version of the record.

View records

Action	Procedure
Open a record from a list	Click the entry number. Or Type the entry number in the Record box and press <Enter>.
Move between records	**Next record:** Click **Next** or press <Alt><N>. **Previous record:** Click **Previous** or press <Alt><P>.
Return to list	Click **Back to List** or press <Alt><B>.
View other folders	At the top of each screen, below the tab set, is a list of the folders that contain records. Click the name of the other folder you want to view or press <Alt><Underlined letter in folder name>. **Example:** To view the Exported folder, press <Alt><X>; to view the Inbox, press <Alt><I>. **Note:** Only folders that contain records are listed.
Print record or list	Display the screen you want to print. In your Web browser, on the File menu, click **Print**. Or press <Ctrl><P>.

Send record via e-mail

Use the E-mail action to send a notification record to anyone you need to consult when selecting items for purchase, such as a faculty member, collection developer, or subject specialist.

	Action
1	From any folder, display a notification record. To open the full record from the list: Click the entry number. Or Type the entry number in the Record box and press <Enter>.
2	Click the **E-mail** button or press <Alt><M>.
3	In the **Send Record via E-mail** dialog, enter e-mail addresses for people you want to receive the record you are sending. You can include up to five e-mail addresses. E-mail addresses are limited to 40 characters. **Note:** The system does not remember the addresses you enter for future messages. However, the browser can complete previously used addresses after you type the first few characters.
4	The **Include Me** option is selected by default; the system sends a copy of the message to your e-mail address. If you prefer not to receive a copy of the message, clear the check box. **Note:** If you clear the **Include Me** option, you do not receive a copy of the current message. However, the next time you take the E-mail action, the default setting (Include Me selected) is restored. You cannot change the default.

	Action
5	The Sender Name and Sender E-mail boxes already contain your name (as used within WorldCat Selection) and your e-mail address (as you entered it in your Preferences). **Note:** You **cannot** change the system-supplied Sender Name in the E-mail dialog. Administrator privileges are required to change the system name for a user. You can change the return e-mail address shown in the dialog. However, the changed address is used only once: in the current message. The next time you use the E-mail action, the dialog contains the default Return Address you entered in Preferences.
6	**(Optional)** In the Additional Notes area, type any queries, explanations, or other notes you want to include in the message. You can enter up to 500 characters in the text box.
7	Review the message and make corrections or additions, if needed.
8	Click **E-mail** (or press <Alt><M>) to send the message including the text of the displayed notification record. Or Click **Cancel** to discard the message and close the Send Record via E-mail dialog. **Result:** The system sends the message to the specified recipients. The dialog closes and the system redisplays the record you sent via e-mail. The confirmation message **E-mail successfully sent** appears in a gray information bar at the top of the record.

Edit records

The following table explains how to change editable content in a notification record.
Note: You cannot make these changes in records after they are exported. Records in the Exported folder are view only.

Content item	Procedure	Source / Notes
Price May include currency type (read-only).	**To change:** Edit the displayed price or type the new price in the box. **Note:** The currency type (such as USD or EUR) appears if the record provides a value. This text is read-only.	**Source:** Vendor-supplied price, if any. If the vendor data does not include a price, the Price box is empty. **Note:** The vendor price (if any) also appears in the Vendor Information area.
Quantity	**To change:** Type the number of copies in the text box.	**System supplied default:** 1.

Content item	Procedure	Source / Notes
Fund	**To change:** On the Fund list, click the fund you want. **Note:** Until you choose funds in Preferences, the Fund list is empty. **Note: Fund may be required** Administrators can require selectors to specify a Fund before taking the Select action.	**Fund list not shown** if administrator did not define any funds for your institution. **Source:** Vendor-supplied fund, if the vendor specified a fund included in the institution funds defined by the administrator. If the vendor data does not include a fund, or the vendor-supplied fund is not in the institution list, the Fund box is empty. After you customize the institution funds list in Selector Preferences, the list includes funds you specified.
Location	**To change:** On the Location list, click the location you want. **Note:** Until you choose locations in Preferences, the Location list is empty. **Note: Location may be required** Administrators can require selectors to specify a Location before taking the Select action.	**Location list not shown** if administrator did not define any locations for your institution. **Source:** Vendor-supplied location, if the vendor specified a location included in the institution locations defined by the administrator. If the vendor data does not include a location, or the vendor-supplied location is not in the institution list, the Location box is empty. After you customize the institution locations list in Selector Preferences, the list includes locations you specified.
Deferral	**To change:** On the list, click the reason you want. **Default:** None	**Source:** List of possible reasons you define in Selector Preferences. If you do not supply reasons, text in the Deferral box indicates that no reasons are available.
Forward To	**To change:** On the list, click the name of the selector you want. **Default:** None	**Source:** Forward To box lists other selectors at your institution. Selectors are listed by aliases supplied by the administrator, or by authorization number if the aliases are not defined. OCLC supplies a list of authorized Selection users for your institution.
ISBN to Export First	**Default:** The first ISBN in the WorldCat record appears first in the exported record. **To change:** On the list, click the ISBN you want to place first in the exported record.	**Source:** WorldCat record for the item. If the WorldCat record contains multiple ISBNs, all ISBNs appear in the **ISBN to Export First** list.

Content item	Procedure	Source / Notes
Note fields	**Default:** Field labels and default content as defined by your site administrator. (No note fields display unless defined by the administrator.) **To change:** In each field, edit the displayed default note or type a new note.	**Source:** Administrator settings for notes to display in all notification records. Field labels defined by the administrator are not editable. Selectors can modify or replace any default text in each field. **Length:** Up to 500 characters. For long notes, the first two lines appear in the field. Scroll to view the remaining text.

Save or cancel changes

Action	Procedure
Save changes	Click **Save**. Or Press <Alt><V>. **Result:** Changes made since you last saved the record are saved. The record remains open. **Update list to show changes to one record:** Click **Back to List** (or press <Alt><B>) to return to the list after saving changes. **Refresh entire record list:** Click the folder name on the navigation bar (or use the assigned keystroke).
Cancel changes	Click **Cancel**. Or Press <Alt><C>. **Result:** Changes made since you last saved the record are reversed. The record remains open.
Automatic save	When you take an action, view another record in this folder, return to the record list, or view another folder, the system closes the displayed record and saves changes you made since you last saved the record. When you log off, the system closes open records and saves any unsaved changes.

Take actions on notification records

Actions you can take on records depend on which folder contains the records.
Note: When viewing a list of records in the Selected, Deferred, Forwarded to Others, or Rejected folder, you cannot take the action used to move the records to that folder. However, when viewing a full record in the Selected, Rejected, or Deferred folder, you can take any action.

- Inbox, Forwarded to Me, Selected, Deferred, Forwarded to Others, Rejected: All actions
- Exported: No actions

	Action
1	Open the full record from the list. Click the entry number. Or Type the entry number in the Record box and press <Enter>.
2	Decide which action you want to take.
3	To Forward the record, in the Forward To list, click the name of the selector you want to receive the record(s). **(Required)** To Defer the record, you can specify a reason for deferring. In the Deferred Reason list, click the reason you want. **(Optional)** **Change deferral reason.** To assign a different reason for deferral, On the Deferred Reason list, click the new reason. Then click **Save** or press <Alt><V>.
4	To take an action on the record, click the button for the action. Click **Select**, **Reject**, **Defer**, or **Forward**. Or Use the keystroke for the action: • Select -- press <Alt><T> • Reject -- press <Alt><R> • Defer -- press <Alt><E> • Forward -- press <Alt><W> **Results** • Status of the record changes from **Inbox** to Selected, Rejected, Deferred, or Forwarded to Others. • Selection adds the records to the folder that contains records with the new status. • The system closes the record and opens the next record in the current folder. • The record list is refreshed. Processed records are removed. If you had re-sorted the list, the re-sorted order is retained. • Records forwarded to another selector move to the Forwarded to Me folder for that selector. Copies of forwarded records move to your Forwarded to Others folder. • For Deferred records, the Deferred folder includes a column to show the reason for deferral, if you specified a reason.

Note: Fund and/or Location required on Select action
Administrators can require selectors to specify a Fund and/or a Location. before taking the Select action.
Single record. If this requirement is in effect, and you attempt to select a record without the required Fund/Location value(s), an error message alerts you to the missing information and the Select action fails.
Flagged records on a list. If you take the Select action on multiple flagged records, records missing the required Fund/Location are unflagged and the Select action fails. Other records remain flagged, but not selected. After supplying the required Fund/Location in the unflagged records, and then reflagging them, repeat the Select action.

Notification record areas

Record area	Content
Editable data (See the **Edit records** section for details.)	Price Quantity Fund Location Deferral Forward To ISBN to Export First
Bibliographic data	Extracted from the current version of the WorldCat record for the item. The system retrieves the data from WorldCat each time you open the notification record in Selection, reflecting any changes made to the master record in WorldCat. The record shows whether your institution holds the item and gives the total holdings in WorldCat. **Find in a Library:** Click the OCLC control number to display the Find in a Library® service at WorldCat.org in a new window. Use the screen to locate WorldCat libraries that hold the work described in the current record and to link directly to library OPACs. You can also access cover art, information on alternative formats (large print, audiobooks, etc.), user reviews and other evaluative content. **FirstSearch link:** If your administrator enabled this optional link, you can click the hyperlinked text **FirstSearch** to link directly to the WorldCat record in FirstSearch. When you click the link, the system automatically logs on to FirstSearch and retrieves the record by OCLC control number. **OpenURL link to search for a title, author, or ISBN in your library catalog:** If your administrator enabled this optional link, you can click the hyperlinked **title**, **author**, or **ISBN** in any notification record to link directly to the record in your library's catalog. When you click the link, the system automatically opens a new browser window and sends a title, author, or ISBN query to your link resolver. If the record is found in your local system, the record appears in the new window.

Record area	Content
Vendor information	View-only content supplied by the vendor. May include a logo or other image. If the the vendor control number is underlined, it is a hypertext link to the notification record in the vendor system. **Default selector only: distribution status.** If you are the default selector, you can determine why the record came to you. The last line of the vendor information area contains the record’s distribution status. The text indicates that (1) the record did not match any collection areas defined by your administrator, or (2) all selectors excluded the record. **Note:** If a vendor sends OCLC two copies of the same record in one file (possibly for different customer IDs), each record is processed individually for record distribution. As a result, the first copy might match to a selector, while the second copy does not match any selector. If so, the second copy is distributed to the default selector, even though the first copy matched a selector. When the default selector views the record, the first selector's name appears at the bottom of the record.
Default notes	Three default note fields defined by the institution administrator. The administrator can customize the field labels and the text that appears in each field. The same notes, if defined, appear in all notification records.
Other Selectors and record statuses	Lists other selectors who received copies of the notification record you are viewing. Also lists selectors to whom you forwarded records and/or selectors who forwarded records to you. If your library uses Selection as part of a library group, selectors from other group institutions may be listed. For each selector, the list gives the institution name, the origin/vendor (for selectors at your institution), the folder containing the record, and the date of the last action on the record. If the selector’s name ends with an asterisk (e.g., **Robert***), the record has been deleted from the system and is no longer available to the selector. Use the list to track the decisions others make on this item. **Notes:** **Multiple copies received.** If you received multiple copies of the record, the list includes entries for your other copies.

5 Search notification records

About searching for notification records

- Selectors can search for their own notification records in any folder: Inbox, Selected, Forwarded to Me, Deferred, Forwarded to Others, Rejected, or Exported.
- To access the Search Notification Records screen from another screen, click the Searching tab or press <Alt><G>.
- The screen provides ten text boxes for entering search terms; for each box, one of the ten indexes is selected by default. However, you can enter search terms in any box and select any index.
- Use one or more keywords to search most of the ten indexes (two indexes, Source and Deferred Reason, require that you enter the complete text or use truncation). You can truncate keywords after you type at least two characters of the word. For greater precision, combine searches in two or more indexes using Boolean **AND**.
- **Diacritics in searches.** Do not include diacritics or special characters in search terms. To prevent errors, formulate searches using standard letters and numbers

Enter a search

	Action
1	Click the Searching tab or press <Alt><G>. The Search Notification Records screen appears.
2	Select the folder to search. On the Search In list select a folder name.
3	In any text box, type one or more words to search for in one index. You can use right truncation for any search; type at least two characters and then type an asterisk (*****). **Note:** To search the Source index or the Deferred Reason index, type the full text of the data in the record, or type the first few characters (at least two) and add an asterisk to truncate. **Note: Asterisk within a word.** To search for a word that contains an asterisk (*****), replace the asterisk with a space in the search term. For example, to search for the call number JF1338* 352.6/69/097105, type the search term as **JF1338 352.6/69/097105**.
4	In the list to the right of the search entry box, select an index to search.
5	**Optional:** Specify a combined search. Use other text boxes to specify a more precise search. Include one or more additional keywords and select the appropriate index for each. Selection combines multiple keywords with Boolean **AND**.
6	Click **Search** or press <Enter> or <Alt><S>.

Indexes: data indexed and example searches

Index	Data Indexed	Example
Author	MARC record fields: 100, 110, 111, 700, 710, 711 (all alphabetic subfields)	Grisham
Title	MARC record fields: 130, 240, 245 abfghknp, 246, 247, 730, 740 (all alphabetic subfields)	Broker
Publisher	MARC record fields: 260b, 261b, 262b	Oxford
Source **Note:** Keyword searching is not available for this index. Enter the complete text of the source **or** use truncation.	Source name	Harrassowitz Aux Amateurs Aux*
Deferred Reason **Note:** Keyword searching is not available for this index. Enter the complete text of the reason **or** use truncation.	Text supplied by user	Purchase next fiscal year Pur*
Call number	MARC record fields: 050, 055, 060, 070, 082, 086, 090, 092, 096 (all subfields)	PR23* 650 **Note:** Include hyphens and/or periods in your search.
Publication Date	MARC record fixed field: Date 1 (field 008, bytes 7-10)	2007
Added Date	Format YYYYMMDD	20080427

Index	Data Indexed	Example
Projected Date	MARC record field 263 Selection indexes the date supplied in the record. The date format may be either **yyyymm** or **yymm**.	200911 0911
Subject	MARC record fields: 600-699 (all subfields)	chemistry, organic

Search results

- Retrieved records (one or more) appear in the format used to list records in folders. The number of records found appears at the top of the results screen.
- The number shown next to the name of the specific folder you searched (in the blue bar at the top of the results screen) represents the number of records in your search results, **not** the total number of records in the folder. To view the full list of records for the folder, click the folder name or press the shortcut key.
- You can take actions on records in a results list just as in a folder list. Available actions are: Select, Reject, Defer, and Forward.
- When you take an action from a search results list, after the action is completed, Selection redisplays the search results list.
- To view a full record, click the hyperlinked record number or type the record number in the **Record** box at the top of the list.
- You can edit a retrieved record, save the record, and take the following actions: Select, Reject, Defer, Forward, Save, Cancel, and Text Only.
- To return to the search results list after viewing a record, click **Back to List** or press <Alt><B>.

6 Selector preferences

About selector preferences

- On the Preferences screen, you can
  - — Use commands to remove unwanted notification items from your Inbox, Forwarded to Me, and Deferred folders on demand. The Preferences screen provides buttons that automatically reject records for materials your institution holds and/or records another selector has selected.
  - — View a summary of your current exclusion settings and record distribution criteria
  - — Provide your return e-mail address to include when you send records via e-mail
  - — Customize sort order (primary and secondary) for record lists
  - — Create and edit a list of funds you can choose when taking actions or editing records
  - — Create and edit a list of locations you can choose when taking actions or editing records
  - — Create and edit a list of Deferred Reasons you can choose when taking the Defer action on records.
- Your settings remain in effect until you change them.
- Preferences are associated with each authorization that includes Selector-level capabilities.

Go to the Selector Preferences screen

Click the **Preferences** tab.
Then click **Selector Preferences** or press <Alt><S>.
At the top, the Selector Preferences screen shows your name and the date/time you last updated the settings.

Reject notification records on demand

- You can use the Reject Items on Demand buttons any time you notice notification records in your folders that describe items already in your collection and/or materials already selected by another user.
- After you take either action, a message appears at the top of the Preferences screen that reports how many records were rejected and whether they were already held or already selected.

	Action
1	**Reject records for materials already held.** Under Reject All Notification Items, click the **If Already Held** button or press <Alt><H>. **Results:** • The system checks the Held column in notification records in your Inbox, Forwarded to Me, and Deferred folders to identify records for materials in your collection. • Notification records for items your library holds move from your Inbox, Forwarded to Me, and/or Deferred folders to your Rejected folders. **Note: Records with holdings set today not rejected.** The system identifies records for held items by checking for the **Held** column in the folder list. If the column shows the value **Held**, the record is rejected. However, data in lists may be up to 24 hours out of date because lists are updated nightly (not continuously). The Held column does not reflect holdings set since the last nightly update.
2	**Reject records for items selected by other selectors.** Under Reject All Notification Items, click the **If Selected By Others** button or press <Alt><B>. **Results:** • The system checks other selectors' Selected and Exported folders for records that are also in your Inbox, Forwarded to Me, or Deferred folders. • **Note:** To identify items selected by others, the system scans records deleted within the last 365 days from other selectors' Exported folders. • Notification records on which another selector has taken the Select action move from your Inbox, Forwarded to Me, and/or Deferred folders to your Rejected folder.

View your exclusion and record distribution criteria

- If you find that you are receiving inappropriate notification records and/or that records you want are not being distributed to you, the problem may be with record distribution criteria your administrator has set up for your collection area. Or, you may need to add, remove, or adjust an exclusion setting.
- To help you diagnose the problem and find an effective solution, Selection provides a read-only summary of all settings that affect which records arrive in your Inbox. The screen includes criteria used to route records to the collection areas assigned to you (set up by your administrator) and the exclusion criteria you have specified to refine record distribution to fit your expertise and interests.
- To access the summary, on the Preferences tab click **Selector Distribution** or press <Alt><D>.

Set preferences

	Action
1	**Provide your return e-mail address for sending records via e-mail** In the Return E-mail Address text box, type the e-mail address (up to 40 characters) to include in messages that contain notifications records. **Note:** From a record or list, use the **E-mail** button to send records to faculty, subject specialists, or others who review items available for purchase.
2	**Customize order for record list** Under Notification List Order, customize ordering of items in the Inbox and other folders. 1. For the Primary Sort, on the Field list click the name of the record field (list column) to use as the primary sort. If desired, change the direction for primary sorting. 2. To specify a secondary sort, choose the desired field and direction. **Default sort order:** Descending by Added (primary sort) and ascending by Source (secondary sort).
3	**Define reasons for deferral** The Deferred Reasons area contains 40 text boxes in which you can enter descriptions of common reasons for deferring a selection decision. **Assign a defined reason.** Reasons you supply are included in the Deferred Reason list displayed at the top of a record list or a notification record. When you defer a record, choose a reason from the Deferred Reason list to record why you postpone your decision. **Change assigned reason.** Taking the **Defer** action moves the record to the Deferred folder. If appropriate, you can change the reason assigned to a record or a group of records. **List:** Flag the record(s) on the Deferred list and then choose a new reason from the Deferred Reason list box. Then take the Defer action to assign the new reason. **Record:** Open the record and choose a new reason. Then take the Defer action to assign the new reason. **Add a reason:** In an empty text box, type an explanation of the reason (up to 40 characters). **Edit a reason:** Add, delete, or replace text. **Delete a reason:** Clear the text of the reason you want to remove. **Default:** No system default. All text boxes are empty until you supply reasons. **Note:** Until you supply at least one reason, the Deferred Reason list box contains a message indicating that no reasons are defined. Reasons you supply appear on the Deferred Reason list in order as entered on the Preferences screen.
4	**Choose funds** The Funds area lists the funds your administrator set up for your library. Use the list to choose the funds allocated for the materials you select. **Include a fund:** Click the empty box next to the fund name. A check mark appears in the box. **Exclude a fund:** Click the marked box next to the fund name. The check mark disappears. **Default:** All funds defined by the institution administrator are listed, but none are marked. Until you choose funds in Preferences, the Fund list provided in displayed records is empty.

	Action
5	**Choose locations** The Locations area lists the locations your administrator set up for your library. Use the list to designate locations for which you select materials. **Include a location:** Click the empty box next to the fund name. A check mark appears in the box. **Exclude a location:** Click the marked box next to the fund name. The check mark disappears. **Default:** All locations defined by the institution administrator are listed, but none are marked. Until you choose locations in Preferences, the Location list provided in displayed records is empty.
6	At the bottom of the screen, click **Save** or press <Alt><V> to save the updated preferences. **Result** • Updated preferences become the default settings for your authorization. • Selection applies these settings until you change them. **Cancel changes to preferences.** Click **Cancel** or press <Alt><C> to keep your previous settings.

7 Record exclusion options for selectors

About excluding records from your inbox

- Establishing record-exclusion criteria is **optional**. WorldCat Selection provides these options to help you prevent inappropriate notification records from cluttering your Inbox, wasting your time, and delaying your work on high-priority records.
- The system applies your exclusion criteria **after** using criteria your administrator has established to match notification records to collection areas and route the records automatically to selectors assigned to each area.
- Exclusion criteria (like record distribution criteria set by administrators) are applied **only** when records are loaded. These criteria are **not** applied to records forwarded to you by other selectors.
- Exclusion criteria are easy to change. Thus, you can decide to exclude certain records temporarily (for example, when focusing on a special project) or temporarily receive records you normally want to exclude (for example, when handling work for an absent colleague).
- You can exclude records by defining any (or all) of the following criteria:

  —Keywords or phrases that occur in certain MARC fields/subfields

  —Fixed-field Lang code (language of the work)

  —Fixed-field Ctry code (country of publication)

  —Fixed-field Date (year or range of years)

  —Fixed-field GPub code (type of government publication)

  —Material type (MARC format of the item)

  —Apply each criterion to records from all vendors or from one vendor

  —Vendor (exclude all records from on vendor or from all vendors except one)
- Your settings remain in effect until you change them.
- Record-exclusion criteria are associated with each authorization that includes Selector-level capabilities.
- **Default selector and record exclusion.** If the default selector has set up exclusion criteria, these criteria are **not** applied to records that are sent to the default selector because they cannot be distributed to any specific selector. (However, records distributed directly to the person who is acting default selector are handled as usual; if they match a personal exclusion settings, they are excluded).

Go to the Selector Excludes screen

Click the **Preferences** tab.
Then click **Selector Excludes** or press <Alt><E>.

View your exclusion and record distribution criteria

- If you find that you are receiving inappropriate notification records and/or that records you want are not being distributed to you, the problem may be with record distribution criteria your administrator has set up for your collection area. Or, you may need to add, remove, or adjust an exclusion setting.

- To help you diagnose the problem and find an effective solution, Selection provides a read-only summary of all settings that affect which records arrive in your Inbox. The screen includes criteria used to route records to the collection areas assigned to you (set up by your administrator) and the exclusion criteria you have specified to refine record distribution to fit your expertise and interests.
- To access the summary, on the Preferences tab click **Selector Distribution** or press <Alt><D>.

Save to retain changes

Action	Procedure
Save settings	When finished setting or changing options, click **Save** or press <Alt><V>.
Save action required to preserve changes	**Note:** If you move to another screen, the system discards changes made since your last Save action. **No warning message** appears to alert you about unsaved changes.
Cancel changes	To cancel changes you have made, click **Cancel** or press <Alt><C>.

Functions for specifying exclusion criteria

Action	Procedure /Note /Example
Apply criterion to records from one vendor or all vendors **Required setting for each criterion entered**	In the **Vendor** column, open the list and select a vendor name or **All Vendors**. **Results** **One vendor:** Selection excludes matching records from the specified vendor only. **All vendors:** Selection excludes matching records from all vendors. **Vendor setting required.** If you do not choose either All Vendors or a vendor name, Selection displays an error message when you save the Excludes settings.
Exclude **only** one characteristic	1. Specify a characteristic: for example, a language, country, or material type. 2. In the Exclude column, select **Only**. 3. Click **Save** or press <Alt><V> to save the entry.
Exclude **only** multiple specific characteristics	1. Specify a characteristic: for example, a language, country, or material type. 2. In the Exclude column, select **Only**. 3. Click **Save** or press <Alt><V> to save the entry and add a new row of entry boxes. 4. Repeat steps 1--3 for each additional exclusion criterion.
Exclude **all but** one characteristic (all **except** one)	1. Specify a characteristic: for example, a language, country, or material type. 2. In the Exclude column, select **All But**. 3. Click **Save** or press <Alt><V> to save the entry.

Action	Procedure /Note /Example
Exclude **all but** multiple specific characteristics (all **except** two or more specific languages, countries, material types, etc.	1. Specify a characteristic: for example, a language, country, or material type. 2. In the Exclude column, select **All But**. 3. Click **Save** or press <Alt><V> to save the entry and add a new row of entry boxes. 4. Repeat steps **1** and **2** to specify one or more additional characteristics in the same area, such as two more languages. **Note:** if you specify multiple **All But** exclusions for the same element, they are treated as options combined with Boolean **OR**. For example, if you exclude **All But** English and **All But** German, all items except those in English or German are excluded, leaving only English and German language titles.
Reminder: You must save to confirm changes and add boxes for more entries	After any change to your exclusion settings, click **Save** or press <Alt><V>. The system saves the entry and opens another row of text boxes.
Delete entry	In the Action column, click the **Delete** button for the entry you want to remove. Then click **Save** or press <Alt><V>.

Exclude records by keyword or phrase

- Use keyword exclusion criteria to specify keywords or phrases likely to appear in records you want to exclude and indicate the fields (with subfields) to check for each keyword or phrase.
- The Selection system processes keyword exclusion criteria against the full bibliographic record from WorldCat for keywords in fields 000-899 (which corresponds to the data shown in the WorldCat portion of the Selection record display). The system processes keyword criteria defined for fields 900-999 against the vendor-supplied data (which corresponds to the data shown in the vendor portion of the Selection record display).

Action or option	Procedure /Note /Example
Enter keyword or phrase	In the Keyword Or Phrase box, type the word or phrase to match. Limited to 50 characters, which includes spaces. Keyword matching is not case-sensitive.
Match variations (right truncation)	To match variations of a word or phrase, type the beginning of the word or phrase followed by *****. You must enter at least 2 characters before the truncation symbol.
Example truncated keywords:	To match the words economics, economist, economy, etc. enter the keyword as: **econom*** To match stock market or stock markets, enter the phrase as: **stock market***

Action or option	Procedure /Note /Example
Specify fields and subfields	In the Tag(s) box, type a three-digit MARC tag or a range of tag numbers. **Subfields.** Enter a single one-character subfield code. If you do not specify a subfield, the system searches all subfields. **Range of fields.** Indicate ranges with hyphens. **Example:** To specify all 5xx fields, enter **500-599**. **Whole record.** Enter: **000-899**.
Example keywords and fields/subfields:	Economist -- 260 field Mexico -- 260a

Tip: Keywords defined for record distribution match records in which the keyword appears as part of a hyphenated compound

When searching a record for words that match a keyword used for record distribution, Selection treats hyphens as spaces. As a result, if either word of a hyphenated compound matches a keyword, the record is considered a match. In some cases, this may be an inappropriate match and cause nonrelevant records to appear in your Inbox.
For example, if your administrator specifies the keyword **African** to match to the collection area **Africa**, then a record that contains the compound **African-American** is considered a match to that area. If this match is not appropriate and you, a selector for **Africa**, do not want to see records containing **African-American**, you can set up exclusion criteria to remove records that contain **African-American**.

Exclude records by language of the work (fixed-field Lang element)

Action	Procedure /Note /Example
Specify the MARC code for the language	In the **Language** column, click the question mark (**?**) to the right of the entry box. In the popup window (top left corner of the screen), click the name of the language to insert the code in the entry box. Or type the code in the entry box.
Verify the meaning of a MARC language code	To check the meaning of a language code previously entered, hover the mouse pointer over the question mark (**?**) to the right of the code you want to check. A small popup window appears, showing both the code and its official meaning.
Exclude **Only** one language (or multiple specific languages)	For each language to exclude, in the Exclude column, select **Only**. To exclude other language(s), specify each as a separate entry.

Action	Procedure /Note /Example
Exclude **All But** one languages (or multiple specific languages). That is, exclude all languages **except** one or more languages you specify.	For each language to retain, In the Exclude column, select **All But**. To retain other language(s), specify each as a separate entry.
View Library of Congress official code list and guidelines	In the title bar for the **Language** area, click the **question mark** button (**?**) next to the area label.

Tip on excluding in All But certain languages

If you are entering multiple All But criteria to limit your inbox to items for works in a specific list of languages, add an All But criterion for each of the following language codes:
UND (Undetermined language)
MUL (Multiple languages)
ZXX (No linguistic content)

Adding these codes ensures that records you want will not be removed automatically because they lack a precise code. You can examine records that contain these codes and then reject unwanted items.

Exclude records by country of publication (fixed-field Ctry element)

Action	Procedure /Note /Example
Specify the MARC code for the country	In the **Country** column, click the question mark (**?**) to the right of the entry box. In the popup window (top left corner of the screen), click the name of the country to insert the code in the entry box. Or type the code in the entry box.
Verify the meaning of a MARC country code	To check the meaning of a country code previously entered, hover the mouse pointer over the question mark (**?**) to the right of the code you want to check. A small popup window appears, showing both the code and its official meaning.
Exclude **Only** one country (or multiple specific countries)	For each country, in the Exclude column, select **Only**. To exclude other countries, specify each as a separate entry.
Exclude **All But** one country (or multiple specific countries). That is, exclude all countries **except** one or more countries you specify.	For each country to retain, In the Exclude column, select **All But**. To retain other countries, specify each as a separate entry.
View Library of Congress official code list and guidelines	In the title bar for the **Country** area, click the **question mark** button (**?**) next to the area label.

Tip on excluding All But certain countries

If you are entering multiple All But criteria to limit your inbox to items published in a specific list of countries, add an All But criterion for the country code **XX** to **retain** records coded as **No Place**, **Unknown Place**, or **Undetermined**. Adding this code ensures that records you want will not be removed automatically because they lack a precise code. You can examine records coded **XX** and then reject unwanted items.

Exclude records by year(s) of publication

Action	Procedure /Note /Example
Specify the year or the range of years to exclude	In the **Date or Date Range** column, type one four-digit year or a range of years in the entry box. • One year: **nnnn** (Example: **2002**) • Range of years: **nnnn** (Example: **2000-2002**) • Years following a specific year: **nnnn-** (Example: **2002-**) • Years preceding a specific year: **-nnnn** (Example: **-2002**)
Exclude **Only** one year or range of years (or multiple specific years or ranges)	For each year or range, in the Exclude column, select **Only**. To exclude other years or ranges, specify each as a separate entry.
Exclude **All But** one year or range of years (or multiple specific years or ranges). That is, exclude all years **except** one or more single years or ranges you specify.	For each year or range to retain, In the Exclude column, select **All But**. To retain other years or ranges, specify each as a separate entry.

Exclude records by government publication type (fixed field GPub element)

Action	Procedure /Note /Example
Specify the code for the government publication type	In the **Code** column, click the question mark (**?**) to the right of the entry box. In the popup window (top left corner of the screen), click the type of government publication to insert the code in the entry box. Or type the code in the entry box.
Verify the meaning of a MARC government publication type code	To check the meaning of a code previously entered, hover the mouse pointer over the question mark (**?**) to the right of the code you want to check. A small popup window appears, showing both the code and its official meaning.
Exclude **Only** one publication type	For each publication type, in the Exclude column, select **Only**. To exclude other types of government publications, specify each as a separate entry.

Action	Procedure /Note /Example
Exclude **All But** one type of government publication (or multiple specific types). That is, exclude all types of government publications **except** one or more publication types you specify.	For each type of government publication to retain, In the Exclude column, select **All But**. To retain other publication types, specify each as a separate entry.
View entry guidelines and list of valid codes in *OCLC Bibliographic Formats and Standards*	In the title bar for the **Government Publication** area, click the **question mark** button (**?**) next to the area label.

Exclude records by type of material (MARC format)

Action	Procedure /Note /Example
Specify the material type (MARC format)	In the **Format** column, on the list of MARC formats, click the name of a format to insert the name in the entry box.
Exclude **Only** ‘one material type	For each material type, in the Exclude column, select **Only**. To exclude other types of material, specify each as a separate entry.
Exclude **All But** one type of material (or multiple specific types). That is, exclude all types of material **except** one or more types you specify.	For each type of material to retain, In the Exclude column, select **All But**. To retain other types, specify each as a separate entry.

Exclude all records from a specific vendor

Action	Procedure /Note /Example
Exclude all records from a specific vendor	In the **Exclude all Vendor Records** area, in the **Vendor** column, select the vendor whose records you want to exclude. **Note:** To exclude all records from more than one vendor, click **Save** (or press <Alt><V>) to save changes and open a new entry box. Then select another vendor whose records you want to exclude.

Details on combining exclusion criteria

Processing Only criteria. Selection processes **Only** exclusion criteria as follows:

- First, Selection processes criteria that use **Only** to exclude records for All Vendors. For example, if you exclude **Only** scores format records for **All**

Vendors, Selection first removes records for scores from all vendors, leaving records for all formats **except** scores.

- Second, Selection processes criteria that use **Only** to exclude records from a single vendor. For example, if you exclude **Only** sound recording records from Blackwell-US, Selection removes sound recording format records supplied by Blackwell-US, leaving all formats **except scores and sound recordings** from Blackwell-US and leaving records in all formats **except scores** from all other vendors.

Processing All But criteria. Selection processes **All But** exclusion criteria as follows: Note that multiple All But criteria for a single characteristic are treated as options combined with Boolean **OR**.

- First, Selection processes criteria that use **All But** and apply to records from **All Vendors**. For example, if you exclude **All But** Chinese language titles received from **All Vendors**, Selection retains only records for Chinese language materials received from any of your vendors.
- Second, Selection processes criteria that use **All But** to exclude records received from a single vendor and appends them to the previous subset. For example, if you exclude **All But** Italian language and **All But** English language records from Casalini, Selection retains Italian OR English language records from the original set of records and appends these records to the previous results, leaving only Chinese, English, or Italian language items from Casalini and only Chinese language items from all other vendors.

8 Summary of selector distribution criteria and exclusion settings

About the summary screen

- If you receive inappropriate notification records and/or if you do not receive some of the records you need, the problem may be with record distribution criteria your administrator has set up for your collection areas. Or, you may need to add, remove, or adjust an exclusion setting.
- To help you diagnose the problem and find an effective solution, Selection provides a read-only summary of all settings that affect which records arrive in your Inbox.
- The Selector Distribution screen includes criteria used to route records to the collection areas assigned to you (set up by your administrator) and the exclusion criteria you have specified to refine record distribution to fit your expertise and interests.
- By reviewing the summary, you can troubleshoot many distribution problems and then resolve them by modifying your exclusions or by conferring with your administrator.
- **Example.** As an expert in European medieval history, you select items for your library's collection in that area. But a colleague who is designated the default selector often forwards to you records that you should have received directly. A review of your Selector Distribution screen indicates that records are being routed correctly to your Medieval Hist collection area, but reveals that you inadvertently excluded records for Latin language materials by forgetting to specify an **All But** criterion for the Latin language (as you did for French, German, English, and Italian). After adding the **All But** setting for Latin, you (not the default selector) receive appropriate records for Latin language items.

Access your summary screen

	Action
1	Click the **Preferences** tab.
2	On the Preferences tab click **Selector Distribution** or press <Alt><D>.

Content of the summary screen

The following table lists the types of information provided in the Selector Distribution screen. Note that some areas may be empty while others contain multiscreen lists of criteria.

Tip: Verify the meaning of a MARC code for language, country, or government publication. To check the meaning of a language (**Lang**), country (**Ctry**), or government publication (**GPub**) code, hover the mouse pointer over the code you want to check. A small popup window appears, showing both the code and its official meaning.

Screen section heading	Description
Collection Areas	First section, showing criteria used by administrators to distribute records to collection areas. Contains **only** criteria for distribution to collection areas to which you are assigned.
Call Number Ranges	Specifies call number ranges that identify records for routing to appropriate collection areas.
Keyword or Phrase	Specifies a word or phrase that, if found in a specific MARC tag/subfield, identifies records for routing to a collection area.
Language	Specifies fixed-field language **(Lang)** codes that identify records for routing to a collection area.
Country of Publication	Specifies fixed-field country **(Ctry)** codes that identify records for routing to a collection area.
Date or Date Range	Specifies publication dates that identify records for routing to a collection area.
Government Publication	Specifies fixed-field government publication type **(GPub)** codes that identify records for routing to a collection area.
Material Type	Specifies MARC format (fixed-field material type **Type** codes) that identify records for routing to a collection area.
Excludes	Second section, showing the exclusions you have set up to remove irrelevant records from your inbox.
Keyword or Phrase	Specifies a word or phrase that, if found in a specific MARC tag/subfield, identifies records you want to exclude from your Inbox (using the **Only** option) or records you want to retain (using the **All But** option).
Language	Specifies fixed-field language **(Lang)** codes that identify records you want to exclude from your Inbox (using the **Only** option) or records you want to retain (using the **All But** option).
Country of Publication	Specifies fixed-field country **(Ctry)** codes that identify records you want to exclude from your Inbox (using the **Only** option) or records you want to retain (using the **All But** option).
Date or Date Range	Specifies publication dates that identify records you want to exclude from your Inbox (using the **Only** option) or records you want to retain (using the **All But** option).
Government Publication	Specifies fixed-field government publication type **(GPub)** codes that identify records you want to exclude from your Inbox (using the **Only** option) or records you want to retain (using the **All But** option).

Screen section heading	Description
Material Type	Specifies MARC format (fixed-field material type **Type** codes) that identify records you want to exclude from your Inbox (using the **Only** option) or records you want to retain (using the **All But** option).

9 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><;> (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
Note: 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)

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
Actions from a folder list	
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 **E-mail** button)
Actions from a displayed record	
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 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 **Distribution** 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>

Administrator action	Keystroke
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)

Preferences screen	Keystroke
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)