

WorldCat Selection Administrator Setup Guide

Setting up WorldCat Selection

- The following table outlines the tasks involved in setting up WorldCat Selection for an institution.
- Review this section of the *Setup Guide* to determine the time and resources needed to get Selection working for you.
- WorldCat Selection provides an administrator module to let you set options directly. You can access the following setup screens via the Administrator tab: Institution Detail, User, Funds, Locations, Collection Areas, and Record Distribution.
- **Note:** Many changes you make via the administrator interface do not take effect immediately. Staff currently logged on will see the results of your changes the next time they log on.
- The second part of this *Guide* covers procedures for using these screens to complete setup tasks.

Action	Procedure	Examples/Notes
<p>Schedule when your vendors begin sending data to OCLC</p> <p>Administrator, OCLC, vendors</p>	<p>Work with vendors to ensure that your data is loaded and ready for use the day you “turn on” Selection at your institution.</p> <p>Maintain the vendor’s current schedule for sending notifications.</p> <p>Specify a date after which the vendor sends data to OCLC rather than to you.</p> <p>Set the cutover to occur soon enough for OCLC to receive and load at least one data set from each of your vendors.</p> <p>Or, implement one vendor at a time and move your processing to Selection vendor by vendor. You can continue to add vendors as needed.</p>	<p>Example:</p> <p>You want to start using Selection on March 1. You expect data from Vendor A on Feb. 8, Feb. 15, and Feb. 22. Vendor B will send data on Feb. 6 and Feb. 20.</p> <p>If both vendors send data to OCLC after Feb. 15, your selectors can work with notifications from both vendors when they first log on to Selection.</p>
<p>Request authorizations (new or with Selection added)</p> <p>Administrator, OCLC</p>	<p>Request new or modified authorizations using an OCLC online form. For instructions, go to the Selection ordering page: < http://www.oclc.org/selection/ordering/ >.</p> <p>OCLC sets up authorizations and supplies a list of authorizations/users to the requesting institution.</p>	<p>Selection authorization levels are: Selector, Acquisitions, and Administrator. Each user can have one, two or all three levels.</p> <p>Request Selection-only authorizations or add Selection (any or all levels) to existing cataloging authorizations.</p>
<p>Specify export-related options</p> <p>Administrator Institution Detail screen</p>	<p>Institution-level export options:</p> <ul style="list-style-type: none"> • Enter the default holding library code. • Specify a default name for downloaded files of exported MARC records. Use a name compatible with your ILS. When acquisitions staff download the file, they can change the default name if necessary. • Map vendor- or institution-related data from notification records to fields/subfields in exported MARC records. <p>Setup instructions. In the next section, which covers procedures for setup tasks, see Customize institution-wide settings.</p> <p>Note: Select export method and file delivery destination. Acquisitions staff can use the Export Settings screen to select the export method (manual or automatic) and specify whether to deliver export files to an FTP server.</p>	<p>Data mapping for export</p> <p>Lets you export data you want to include in records loaded to your ILS, such as the vendor name, vendor control number, price, quantity, fund, or custom notes.</p> <p>For each item, specify a MARC tag and a subfield code to contain the data.</p> <p>Examples:</p> <p>Map the vendor name to 980 subfield v. Map the vendor control number to 980 subfield n. Map the price to 981 subfield i. Map the fund to 980 subfield h.</p> <p>Result: Exported record contains:</p> <p>980 h n v 981 i</p>

WorldCat Selection Administrator Setup Guide

Action	Procedure	Examples/Notes
<p>Enter multiple institution symbols</p> <p>Administrator Institution Detail screen</p>	<p>If your institution adds records or sets holdings in WorldCat using multiple OCLC institution symbols, supply the additional symbols via this setting.</p> <p>In the Other Institution Symbols box, enter the symbols you want to add. Use semicolons to separate the symbols.</p> <p>Default setting: No institution symbols entered; the text box is empty.</p> <p>Setup instructions. In the next section, which covers procedures for setup tasks, see Customize institution-wide settings.</p>	<p>After you enter your other symbols:</p> <ul style="list-style-type: none"> • Selection shows all your holdings for all associated symbols. In lists, if your library holds an item under one or more OCLC symbols, the symbol(s) appear in the Held column. In displayed records, the holdings statement specifies all symbols your library has attached to the WorldCat record for that item. • When a selector uses the command that automatically rejects records already held (Reject All Notification Records/If Already Held), the system rejects records held under at least one of your institution symbols.
<p>Require selectors to designate a fund and/or location in selected records (Optional)</p> <p>Administrator Institution Detail screen</p>	<p>Require that selectors specify a fund and/or a location before taking the Select action</p> <p>Use these settings to ensure that all selected records designate the fund to use for purchase and/or the location to receive the item.</p> <p>Default setting: Both options are set to No.</p> <p>Setup instructions. In the next section, which covers procedures for setup tasks, see Customize institution-wide settings.</p>	
<p>Provide selectors with a direct link to the WorldCat record in FirstSearch from the OCLC control number displayed in a notification record (Optional)</p> <p>Administrator Institution Detail screen</p>	<p>Let selectors link directly to WorldCat records via FirstSearch.</p> <p>Turn on direct link to FirstSearch. Supply your institution's FirstSearch authorization number and password to enable a link, via an OCLC control number search, from a notification record to the full WorldCat record in FirstSearch. The selector clicks the hyperlinked text FirstSearch to access the record.</p> <p>No FirstSearch link. Leave the authorization and password text boxes empty if you do not wish to enable the link.</p> <p>Default setting: No FirstSearch link appears in the notification record.</p> <p>Setup instructions. In the next section, which covers procedures for setup tasks, see Customize institution-wide settings.</p>	
<p>Support collaborative use of Selection by members of your library group.</p> <p>Administrator Institution Detail screen</p>	<p>Support collaborative use of Selection within a library group</p> <p>To share information about selection decisions with a self-defined group of libraries, in the Group Institutions box, type a list of the OCLC symbols for the libraries with which you collaborate. Separate symbols with semicolons.</p> <p>Setup instructions. In the next section, which covers procedures for setup tasks, see Customize institution-wide settings.</p>	<p>Note: Each library must specify the symbols of the others. Example: If your symbol is ABC, and you want to share information with a library whose symbol is DEF, you must list DEF in the Group Institutions box; library DEF must enter your symbol, ABC.</p> <p>Default setting: No OCLC symbols entered. Selection data is available only to users at your institution.</p>

WorldCat Selection Administrator Setup Guide

Action	Procedure	Examples/Notes
<p>Provide selectors with a direct link, via your OpenURL link resolver, to the record in your local system (ILS) from the title, author, or ISBN displayed in a notification record (Optional) Administrator Institution Detail screen</p>	<p>Let selectors link directly to records in your local system (ILS) via your OpenURL link resolver.</p> <p>Turn on direct link to OpenURL link resolver. Supply the URL for your institution's link resolver to enable a link, via a title, author, or ISBN search, from a notification record to the full record in your local system (ILS). The selector clicks the hyperlinked title, author, or ISBN to access the record.</p> <p>No OpenURL link. Leave the OpenURL link box empty if you do not wish to enable the link.</p> <p>Default setting: Notification records do not contain hyperlinked title, author, or ISBN text.</p> <p>Setup instructions. In the next section, which covers procedures for setup tasks, see Customize institution-wide settings.</p>	
<p>Set up custom note fields and specify preferred call number types to display in lists (Optional) Administrator Institution Detail screen</p>	<p>Custom note fields</p> <ul style="list-style-type: none"> • Notification records can contain up to three customized note fields. • Administrator supplies a field label and (optionally) default content (up to 500 characters). • Administrator decides whether to include custom note fields in exported records, and defines how to map the custom fields to MARC fields and subfields. • Selectors can change the field content; the field label is read-only. <p>Call numbers on record lists</p> <ul style="list-style-type: none"> • Lists of notification records include a call number. • Administrator specifies call number types preferred for display. • You can select and assign priorities to the following call number fields: 050, 055, 060, 070, 082, 086, 090, 092, 096. <p>Setup instructions. In the next section, which covers procedures for setup tasks, see Customize institution-wide settings.</p>	<p>Example: Custom Note fields</p> <p>For User Field 1, specify the field label Note to Vendor and map the data to 981 subfield m. The selector could enter appropriate notes to the vendor, such as Paperback preferred if available.</p> <p>For User Field 2, specify the field label Requestor e-mail address, and map the data to 981 subfield n. The selector could enter an e-mail address to contact when the item is received.</p> <p>For User Field 3, specify the field label Note to Acquisitions, and map the data to 981 subfield n. The selector could enter appropriate notes to the acquisitions staff, such as Although this is a duplicate copy, please order it.</p> <p>Example: Preferred call number types for lists</p> <p>You can assign call number types for up to six priority levels to ensure that preferred types are displayed if present in records.</p>
<p>Set up automatic deletion of notification records Administrator Institution Detail screen</p>	<p>Define the number of days to retain notification records in each folder. After a record remains in a folder for the specified number of days, the system deletes the record automatically.</p> <p>You can accept system-defined default limits or specify a longer or shorter period within a system-defined range.</p> <p>Setup instructions. In the next section, which covers procedures for setup tasks, see Customize institution-wide settings.</p>	<p>Use the Delete Notification Items area to define the number of days to retain notification records in each folder. After a record remains in a folder for the specified number of days, the system removes the record automatically.</p> <p>Options: You can specify a retention limit for each folder, within a system-defined range. For the list of system-supplied defaults and ranges, see the table following this procedure.</p> <p>Note: The system retains deleted records for one year before permanently deleting them. The status for the deleted record displays with an asterisk for 365 days after it is automatically deleted from a folder.</p>

Action	Procedure	Examples/Notes
<p>Set an option to remove duplicate records from selector Inbox folders daily, after new vendor records are loaded and distributed.</p> <p>Administrator Institution Detail screen</p>	<p>Remove duplicate copies of notification records from Inbox folders for all selectors.</p> <p>The option is off until you turn it on. To keep all copies of records, leave the option set to the default value: Retain All Records.</p> <p>You can remove duplicates based on the date added (Keep first record received) or based on a priority you assign to the vendor (Keep record based on source priority).</p> <p>When you select Keep first record received, for each selector, the system deletes a newly added record that duplicates one previously distributed to the same selector.</p> <p>When you select Keep record based on source priority, if a selector previously received a record from a high-priority vendor, the system deletes a duplicate copy of that record sent to the selector by a lower-priority vendor. However, if a selector receives a record from a low-priority vendor, and then receives a duplicate record from a higher-priority vendor, the new record replaces the existing record in the Inbox.</p> <p>If the removal option is on, a daily process identifies duplicate records in each Inbox and deletes the records. The process scans other folders (Forwarded To Me, Deferred, Selected, and Exported) to determine if a record in the Inbox duplicates a record already received by the specific selector. However, records are deleted from the Inbox only. Records in other folders are never removed because the selector has already taken action on those records.</p> <p>Setup instructions. In the next section, which covers procedures for setup tasks, see Customize institution-wide settings.</p>	<p>Example: 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.</p> <p>The removal process typically runs after new vendor records are loaded and distributed. When selectors log in each day, any duplicate records have been deleted. However, in some cases additional vendor records may load after the process runs. If so, these records are checked the next time the daily process runs</p> <p>Note: Duplicate removal scans deleted records. To identify duplicate titles, the system also scans records deleted from your library's folders within the last 365 days.</p>
<p>Set options for users</p> <p>Administrator Users screen</p>	<p>OCLC supplies a list of Selection-authorized users, including each user's logon greeting and authorization level(s).</p> <p>For each user, the administrator enters a name for display within Selection.</p> <p>The administrator also designates one user as the default selector. The default selector receives notifications that neither specify a selector nor match criteria (call number range or keyword) for an established collection area.</p> <p>Setup instructions. In the next section, which covers procedures for setup tasks, see Set options for users.</p>	

WorldCat Selection Administrator Setup Guide

Action	Procedure	Examples/Notes												
View summary of selector criteria for distribution and exclusion Administrator Users screen	To help you solve problems, you can view a read-only summary of settings that affect which records arrive in each selector's Inbox. The Selector Distribution Admin screen includes criteria used to route records to the collection areas assigned to the specific selector (set up by an administrator) and the exclusion criteria the selector has specified to refine record distribution to fit individual expertise and interests. Setup instructions. In the next section, which covers procedures for setup tasks, see Summary of selector distribution criteria and exclusion settings .	Example: If selectors report receiving inappropriate notification records and/or that needed records are not being distributed to them, the problem may be with record distribution criteria for assigned collection areas (set up by an administrator). Or, the selector may need to add, remove, or adjust an exclusion setting.												
Specify funds and locations Administrator Funds screen, Location screen	Notification records include lists of the institution's funds and locations. The administrator enters a code and a name or description for each fund and each location used by selectors. Selectors choose which of these funds and locations are listed in their records. When selecting an item, selectors use the lists to specify a fund and a location. Note: On the Institution Detail screen, you can choose to require selectors to designate a fund before taking the Select action. Set up funds and locations. In the next section, which covers procedures for setup tasks, see Specify institution funds and Specify institution locations .	Notes: For funds and locations, use your established codes and names or descriptions. Fund and location codes are used in exported records (if mapped to MARC fields). Fund and location names display on lists within the system. Names can be up to 40 characters.												
Set up collection management areas Administrator Collection Areas screen	Collection management areas are used to route notification records automatically when records do not include selector names. Unmatched records go to the default selector. Set up as many areas as you need; there is no system limit. For each area, supply an area name (up to 20 characters) and list the selectors responsible. After you set up areas, use the Record Distribution screen to enter call number ranges, keywords, and fixed-field values to match records to areas. Set up collection areas. In the next section, which covers procedures for setup tasks, see Define collection areas .	Example: Areas might include: BusinGrad, BusinGradmin, MainBus, and Labor . Each area can be assigned to up to 5 selectors, so that any records matching an area can be routed to 5 selectors.												
Automate record distribution by call number range Administrator Record Distribution screen	If records do not specify a selector, the system tries to match them to a subject area by call number range. The administrator specifies call number ranges that correspond to collection areas. Each range can be associated with up to 5 collection areas. Set up distribution by call numbers. In the next section, which covers procedures for setup tasks, see Automate record distribution .	Example call number ranges and associated areas: <table border="1"> <thead> <tr> <th>Range</th> <th>Route to</th> </tr> </thead> <tbody> <tr> <td>HD1 - HD27</td> <td>BusinGrad, BusinGradmin</td> </tr> <tr> <td>HD28 - HD30</td> <td>BusinGrad, BusinGradmin, MainBus</td> </tr> <tr> <td>HD31 - HD31</td> <td>BusinGrad, BusinGradmin, MainBus, Labor</td> </tr> <tr> <td>HD32 - HD58.6</td> <td>BusinGrad, BusinGradmin, MainBus</td> </tr> <tr> <td>HD58.7 - HD59</td> <td>BusinGrad, BusinGradmin, MainBus, Labor</td> </tr> </tbody> </table>	Range	Route to	HD1 - HD27	BusinGrad, BusinGradmin	HD28 - HD30	BusinGrad, BusinGradmin, MainBus	HD31 - HD31	BusinGrad, BusinGradmin, MainBus, Labor	HD32 - HD58.6	BusinGrad, BusinGradmin, MainBus	HD58.7 - HD59	BusinGrad, BusinGradmin, MainBus, Labor
Range	Route to													
HD1 - HD27	BusinGrad, BusinGradmin													
HD28 - HD30	BusinGrad, BusinGradmin, MainBus													
HD31 - HD31	BusinGrad, BusinGradmin, MainBus, Labor													
HD32 - HD58.6	BusinGrad, BusinGradmin, MainBus													
HD58.7 - HD59	BusinGrad, BusinGradmin, MainBus, Labor													

Action	Procedure	Examples/Notes														
<p>Automate record distribution by keywords</p> <p>Administrator Record Distribution screen</p>	<p>In addition to call number ranges, match records to a subject area by keywords found in the record.</p> <p>The administrator specifies keywords that correspond to collection areas and indicates the record field (with a specific subfield if desired) to check for each keyword or phrase. If you do not specify a subfield, the system searches all subfields for the field.</p> <p>To check a range of fields, specify the beginning and ending tags and use a hyphen to indicate a range: 600-699. You can specify a single subfield to check in all fields within the range. If you do not specify a subfield, the system searches all subfields in all fields within the range.</p> <p>Each keyword or phrase can be associated with up to 5 collection areas.</p> <p>Keyword matching is not case-sensitive.</p> <p>Note: You can indicate either a single field or a range of fields to search for each keyword or phrase. You cannot specify a list of single fields. Enter each field separately.</p> <p>To match any variation of a word or phrase, use right truncation. Type the beginning of the word or phrase followed by *. You must enter at least 2 characters before the truncation symbol.</p> <p>Set up distribution by keywords and phrases. In the next section, which covers procedures for setup tasks, see Automate record distribution.</p>	<p>Example keywords and associated areas:</p> <p>Economist -- 260 field -- route to selectors for BusinGrad.</p> <p>Mexico -- 260a -- route to selectors for LatinAmerStud.</p> <p>To check a range of fields, specify the beginning and ending field tags, separated with a hyphen. For example:</p> <p>To check all 5xx fields, enter: 500-599.</p> <p>To have the system check the whole record, enter: 000-899.</p> <p>Example truncated keywords:</p> <p>To match the words economics, economist, economy, etc., enter the keyword as: econom*</p> <p>To match stock market or stock markets, enter the phrase as: stock market*</p>														
<p>Automate record distribution by fixed-field element values</p> <p>Administrator Record Distribution screen</p>	<p>In addition to call number ranges and keywords, match records to collection areas based on values present in key fixed-field elements.</p> <p>You can specify one or multiple values for each element and associate each element/value criterion with up to five collection areas. If you specify multiple values, the system routes records that contain any of the values.</p> <p>Fixed-field elements for record distribution:</p> <ul style="list-style-type: none"> ● Predominant Language (008 bytes 35--37) ● Country of Publication (008 bytes 15--17) ● Date (008 bytes 07--14) ● Government Publication (008 byte 28) ● Material Type (values for Type and BibLvl) <p>Set up distribution by fixed-field element values. In the next section, which covers procedures for setup tasks, see Automate record distribution.</p>	<p>Example fixed-field element values and associated areas:</p> <table border="0"> <thead> <tr> <th data-bbox="987 1178 1170 1205">Element value</th> <th data-bbox="1208 1178 1300 1205">Route to</th> </tr> </thead> <tbody> <tr> <td data-bbox="987 1209 1170 1236">Mat Type - Scores</td> <td data-bbox="1208 1209 1442 1236">MUSICHIST, MUSIC</td> </tr> <tr> <td data-bbox="987 1241 1122 1268">Lang - fre, ita</td> <td data-bbox="1208 1241 1442 1302">LITFREITA, HISTFRE, HISTITAL</td> </tr> <tr> <td data-bbox="987 1306 1089 1333">Ctry - it, fr</td> <td data-bbox="1208 1306 1442 1367">LITFREITA, HISTFRE, HISTITAL</td> </tr> <tr> <td data-bbox="987 1371 1089 1398">Lang - jpn</td> <td data-bbox="1208 1371 1393 1398">JAPAN, GENASIA</td> </tr> <tr> <td data-bbox="987 1402 1068 1430">Ctry - ja</td> <td data-bbox="1208 1402 1393 1430">JAPAN, GENASIA</td> </tr> <tr> <td data-bbox="987 1434 1143 1461">Mat Type - Map</td> <td data-bbox="1208 1434 1433 1461">GEOG, GEOL, MAPS</td> </tr> </tbody> </table>	Element value	Route to	Mat Type - Scores	MUSICHIST, MUSIC	Lang - fre, ita	LITFREITA, HISTFRE, HISTITAL	Ctry - it, fr	LITFREITA, HISTFRE, HISTITAL	Lang - jpn	JAPAN, GENASIA	Ctry - ja	JAPAN, GENASIA	Mat Type - Map	GEOG, GEOL, MAPS
Element value	Route to															
Mat Type - Scores	MUSICHIST, MUSIC															
Lang - fre, ita	LITFREITA, HISTFRE, HISTITAL															
Ctry - it, fr	LITFREITA, HISTFRE, HISTITAL															
Lang - jpn	JAPAN, GENASIA															
Ctry - ja	JAPAN, GENASIA															
Mat Type - Map	GEOG, GEOL, MAPS															

WorldCat Selection Administrator Setup Guide

Procedures for setup tasks

Access WorldCat Selection

	Action
1	Point your browser to the OCLC Connexion service: http://connexion.oclc.org.
2	At the Connexion login screen, enter a WorldCat Selection authorization and password. Click Logon or press <Enter>. Tip: save logon info. At the bottom of the logon screen, click Local Browser Settings . Enter an authorization/password and select the Default button. When you next log on, Connexion displays the default authorization/password automatically.
3	At the Connexion welcome screen, click the Selection tab. Or press <Alt><;> (semicolon). Result: WorldCat Selection opens in a new window. The Connexion session remains active until you close it or an inactivity timeout occurs. Log off Selection: Click Logoff or press <Alt><O>.

Save to retain changes in administrator module

Action	Procedure
Save changes	When finished making changes on any administrator screen, 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>.

Customize institution-wide settings

	Action
1	Click the Administrator tab or press <Alt><A>. Then click My Institution or press <Alt><M>. Note: The Administrator tab displays only if you logged on with an authorization that includes administrator-level capabilities.
2	Set basic options for export functionality At the top of the first section of the screen, check or change these items: <ol style="list-style-type: none"> Default Holding Library Code. Enter the default holding library code, a 4-character code that appears in MARC field 049 in exported records. Export File Name. Keep the default name, export.dat. Or supply the file name your local system expects for records to be imported.

	Action
3	Enter multiple institution symbols If your institution adds records or sets holdings in WorldCat using multiple OCLC institution symbols, supply the additional symbols via this setting. In the Other Institution Symbols box, enter the symbols you want to add. Use semicolons to separate the symbols. After you enter your other symbols: <ul style="list-style-type: none"> Selection shows all your holdings for all associated symbols. In lists, if your library holds an item under one or more OCLC symbols, the symbol(s) appear in the Held column. In displayed records, the holdings statement specifies all symbols your library has attached to the WorldCat record for that item. When a selector uses the command that automatically rejects records already held (Reject All Notification Records/If Already Held), the system rejects records held under at least one of your institution symbols. Default setting: No institution symbols entered; the text box is empty.
4	Require that selectors specify a fund and/or a location before taking the Select action (Optional) The second line of the screen contains two options: Require Fund on Select and Require Location on Select. To ensure that all selected records designate the fund to use for purchase and/or the location to receive the item, set either (or both) options to Yes . Default setting: Both options are set to No .
5	Let selectors link directly to WorldCat records via FirstSearch. Turn on direct link to FirstSearch. Supply your institution's FirstSearch authorization number and password to enable a link, via an OCLC control number search, from a notification record to the full WorldCat record in FirstSearch. The selector clicks the hyperlinked text FirstSearch to access the record. No FirstSearch link. Leave the authorization and password text boxes empty if you do not wish to enable the link. Default setting: No FirstSearch link appears in the notification record.

Action	
6	<p>Support collaborative use of Selection within a library group</p> <p>To share information about selection decisions with a self-defined group of libraries, in the Group Institutions box, type a list of the OCLC symbols for the libraries with which you collaborate. Separate symbols with semicolons.</p> <p>Note: Each library must specify the symbols of the others. Example: If your symbol is ABC, and you want to share information with a library whose symbol is DEF, you must list DEF in the Group Institutions box; library DEF must enter your symbol, ABC.</p> <p>Results</p> <p>Once each group member enters the other members' symbols:</p> <ul style="list-style-type: none"> • If a record is distributed to selectors at two or more libraries, each recipient sees, at the bottom of the record, what action each other recipient (at any member institution) takes on that record. • Statuses of all copies of the record are displayed in each selector's copy until every selector has taken action on the record. • Options, such as automatically rejecting records for items already held or selected by another, do not consider data from other institutions. These options work only on data from the user's own institution. <p>Default setting: No OCLC symbols entered. Selection data is available only to users at your institution.</p>
7	<p>Let selectors link directly to records in your local system (ILS) via your OpenURL link resolver.</p> <p>Turn on direct link to OpenURL link resolver. Supply the URL for your institution's link resolver to enable a link, via a title, author, or ISBN search, from a notification record to the full record in your local system (ILS). The selector clicks the hyperlinked title, author, or ISBN to access the record.</p> <p>No OpenURL link. Leave the OpenURL Link box empty if you do not wish to enable the link.</p> <p>Default setting: Notification records do not contain hyperlinked title, author, or ISBN text.</p>
8	<p>Define custom note fields for notification records (Optional)</p> <p>Enter labels and default content for up to three user-defined fields.</p> <p>Labels and content you supply appear in each notification record. If you do not supply text, the fields are blank.</p> <p>Add a label. Type a label that indicates the information you expect selectors to enter (up to 60 characters).</p> <p>Add content. Type default content for the note field (up to 500 characters). Two lines appear in records; scroll to view additional text. Selectors can change field content while editing.</p>

Action	
9	<p>Map notification record fields to MARC fields/subfields in exported records</p> <p>The Export Fields area lists fields found in notification records. To retain this information in exported records, you define a MARC field/subfield to contain each data item.</p> <p>Map a field: In the MARC Field box, type a three-digit tag number. In the Subfield box, type a one-character subfield code that is valid for the specified field.</p> <p>Note: If you specify a tag but not a subfield code, the system supplies 'a' when you save your entries.</p> <p>Note: If you specify the same MARC tag for multiple notification-record fields, the exported record contains one instance of the tag with multiple subfields, one subfield for each data item.</p> <p>Omit a field for export: Leave the Field and Subfield boxes empty.</p>

WorldCat Selection Administrator Setup Guide

	Action		Action
10	<p>Specify export options for currency information To include the currency type in exported MARC records:</p> <ol style="list-style-type: none"> Specify a field and subfield to contain the data (see step 8 for instructions). Specify which currency values to include in exported records. You have two options: <ul style="list-style-type: none"> Include all currency values, and the price, in exported records (default). Any currency (and price) information in the record are exported in the MARC field/subfield you specify. Specific value only. Include currency (and price) information only for a specific currency value, such as EUR or USD. If the currency field is blank or contains the value you specify, both the currency type and price are exported. If the currency type is another specific value, neither currency nor price are exported. <p>Examples: Include currency and price data for all currencies</p> <p>Mapping: Currency - 910a and Price-910b Currency setting: Include all currency values Distributed record: Currency = EUR; Price = 12.00 Exported record: EUR in 910a; 12.00 in 910b Distributed record: Currency = <blank>; Price = 12.00 Exported record: 12.00 in 910b</p> <p>Include currency and price data for a specific currency only</p> <p>Mapping: Currency - 910a and Price-910b Currency setting: Include <blank> and USD only Distributed record: Currency = EUR; Price = 12.00 Exported record: No data for currency or price Distributed record: Currency = USD; Price = 12.00 Exported record: USD in 910a; 12.00 in 910b Distributed record: Currency = <blank>; Price = 12.00 Exported record: 12.00 in 910b</p>	11	<p>Add institution-specific vendor codes to exported MARC records</p> <p>You can define a specific code (up to 60 characters) for each vendor that supplies notification records to your institution. On export, Selection determines the vendor (source) for each record and inserts the appropriate code in the MARC field and subfield you indicate.</p> <ol style="list-style-type: none"> On the Institution Detail screen, move to the area below the options that map notification record content to MARC fields for export. This area contains a table that lists your active vendors. For each listed vendor, in the Data To Insert Upon Export column, enter the text (up to 60 characters) you want added to exported records. In the MARC Field column, type the 3-digit tag for the field in which you want to insert this data. In the Subfield column, type the 1-character code for the subfield to contain the data. <p>Result: During export, the system determines the source (vendor) for each record and inserts the code you specified. Note: If a vendor becomes inactive (no longer supplies records to your library) before you export all records received from that vendor, the exported records may not contain the vendor code you defined.</p> <p>Default: No default vendor codes or mappings are exported to MARC bibliographic records. Unless you define the codes and the mapping, the field is not exported.</p>
		12	<p>Set priority order for call number field to show on record lists</p> <p>Use the Call Number on Lists area to specify preferred call number types to show in the Call Number column on record lists.</p> <p>Set a priority: To define any priority level, open the list of tags and click the tag you want.</p> <p>Call number fields: You can assign a priority to any of these call number fields:</p> <ul style="list-style-type: none"> 050 -- Library of Congress Call Number 055 -- Classification Number assigned in Canada 060 -- National Library of Medicine Call Number 070 -- National Agricultural Library Call Number 082 -- Dewey Decimal Classification Number 086 -- Report Number 090 -- Local LC-Type Call Number 092 -- Local Dewey Call Number 096 -- Local NLM-Type Call Number

Action	
13	<p>Automatically delete notification records Use the Delete Notification Items area to define the number of days to retain notification records in each folder. After a record remains in a folder for the specified number of days, the system removes the record automatically.</p> <p>Options: You can specify a retention limit for each folder, within a system-defined range. For the list of system-supplied defaults and ranges, see the table following this procedure.</p> <p>Records sent to multiple selectors. When multiple selectors receive copies of the same record, record statuses for each selector's copy appear at the bottom of the record. For example, Selector 1 can see that the record is in Selector 2's Rejected folder. If the record has been deleted from the system for Selector 2, the selector's name ends with an asterisk (for example, Robert*) to denote that the selector no longer has access to the record</p> <p>Note: The system retains deleted records for one year before permanently deleting them. The status for the deleted record displays with an asterisk for 365 days after it is automatically deleted from a folder.</p>
14	<p>Automatically remove duplicate notification records for all selectors. Set an option to remove duplicate records from selector Inbox folders daily, after new vendor records are loaded and distributed. You can remove duplicates based on the date added (Keep first record received) or based on a priority you assign to the vendor (Keep record based on source priority).</p> <p>For details, see the section (later in this topic) titled Automatically remove duplicate records.</p>
15	<p>Check listed Vendor Customer IDs Review the IDs for each of your vendors. Verify that the list is correct and complete. Report errors to your RSP or OCLC.</p>
16	<p>Click Save or press <Alt><V> to save the updated settings. Click Cancel or press <Alt><C> to keep your previous settings.</p>

Open URL links: query formats

To enable Open URL linking to retrieve records from your local catalog, enter the URL for your link resolver in the Open URL Link box (step 6). When a selector clicks a hyperlinked title, author, or ISBN in a notification record, Selection sends the appropriate query to your link resolver. This table shows the format for each type of query. Verify that your ILS responds correctly to queries in these formats.

Note: Open URL queries sent by WorldCat Selection contain the identifier **sid/wcs**.

Query type	Format
Title	Includes rtf.title and ends with rtf.genre=book Format: [link resolver]rfr_id=info:sid/wcs&rtf.title=[title]&rtf.genre=book
Author	Includes rtf.au Format: [link resolver]rfr_id=info:sid/wcs&rtf.au=[author]
ISBN	Includes rtf.isbn Format: [link resolver]rfr_id=info:sid/wcs&rtf.isbn=[isbn]

Automatically delete records: folder default settings

Folder	Default limit (days)	Range of settings (days)
Inbox	180	7 to 180
Forwarded to Me	180	7 to 180
Deferred	180	7 to 365
Forwarded to Others	180	7 to 180
Rejected	14	1 to 30
Exported	14	1 to 90

Data Items to Include in Exported Records	
Vendor Name	Quantity
Vendor Control Number	Fund
Vendor Customer ID	Location
Note from Vendor	User Field 1
Selector	User Field 2
Price	User Field 3

Automatically remove duplicate records (My Institution screen)

- Use this option to remove duplicate copies of notification records from Inbox folders for all selectors.
- Note: Duplicate removal scans deleted records.** To identify duplicate titles, the system also scans records deleted from your library's folders within the last 365 days.

WorldCat Selection Administrator Setup Guide

Action	Procedure
Remove duplicates based on date received	Under Automatically Remove Duplicates, select Keep first record received .
Remove duplicates by source (vendor) priority	Under Automatically Remove Duplicates, select Keep record based on source priority .
Assign vendor priorities	Use the Source Priority Order box to rearrange the names of your vendors to reflect your preferences for record sources. To reposition one vendor name, select the name and then click Move Down or Move Up To reposition multiple names, select the names you want and then click Move Down or Move Up . They selected names need not be adjacent. To reverse the order of two vendor names, select both names and then click Reverse Two . They selected names need not be adjacent.
Assign priority for a new vendor	When you add a new vendor to supply records, the system automatically updates your list of source priorities. The system places the new vendor's name at the bottom of the list. To assign a higher priority for a new vendor, click the vendor name to select it and then click the Move Up button until the name is in the position you want.

Set options for users

Add a user or add/change authorization level. These changes must be done by OCLC staff. For instructions, see the Selection ordering page on the OCLC Web site:

www.oclc.org/selection/ordering/

	Action
1	Click the Administrator tab or press <Alt><A>. Click Users or press <Alt><U>. Note: The Administrator tab displays only if you logged on with an authorization that includes administrator-level capabilities.
2	Find the entry you want to change. Click the Edit button.
3	Review the information for the user.

	Action
4	Enter or edit user information as needed: <ul style="list-style-type: none"> • Selection Name: Type the user's name (limited to 40 characters) as you want the system to display it. For example, this name appears in the Forward To list. Tip: The Forward To list shows names in alphabetical order as you enter them. To alphabetize by first name, enter first name last name. To alphabetize by last name, enter last name, first name. Note: If you change the Selection Name for a selector, users will see the change (for example, in Forward To lists), for future sessions. • Default User: To designate this user as the default selector, select Yes. Default setting is No. The default selector receives notifications that neither specify a selector nor match (via call number range and/or keyword) an established collection area.
5	Click Save or press <Alt><V> to save the updated settings. Click Cancel or press <Alt><C> to keep your previous settings.

Summary of selector distribution criteria and exclusion settings

- The Selector Distribution screen includes criteria used to route records to the collection areas assigned to the specific selector (set up by an administrator) and the exclusion criteria the selector has specified to refine record distribution to fit individual expertise and interests.
- By reviewing the summary, you can troubleshoot many distribution problems and then resolve them by modifying distribution criteria or by conferring with the selector to suggest changes to exclusion settings.
- **Example.** An expert in European medieval history who selects items for the library's collection in that area, reports that the default selector often forwards records that the selector should have received directly. A review of the Selector Distribution screen indicates that records are being routed correctly to the Medieval Hist collection area, but reveals that the selector inadvertently excluded records for Latin language materials by forgetting to specify an **All But** criterion for the Latin language (**All But** criteria are specified for French, German, English, and Italian). After the selector adds the **All But** setting for Latin, the default selector no longer receives records for Latin language items relevant to medieval history.

Access the summary for a selector

	Action
1	Click the Administrator tab or press <Alt><A>.
2	On the Administrator tab, click Users or press <Alt><U>.

WorldCat Selection Administrator Setup Guide

	Action
3	On the Institution Users screen, find the entry for the selector.
4	In the Action column, click the Distribution button.

Specify institution funds (optional)

- Add or delete funds, and update fund codes or descriptions to keep the list current. Include as many funds as you need.
- **Note:** On the Institution Detail screen, you can choose to require selectors to designate a fund before taking the **Select** action.
- On the Selector Preferences screen, selectors view the full list of funds and then choose funds to include in the Funds list displayed at the top of notification records.
- **Fund codes** are actual codes that appear in exported MARC records. If you enter a description for each fund, the description appears on record lists and in the Funds list within notification records. However, if you **do not** supply descriptions, the codes appear instead. To export fund data, you must specify a MARC field and subfield to contain fund codes. (Use the Institution Detail screen to specify MARC fields and subfields for data from notification records that you want to retain in exported records.)
- **Fund descriptions** (limited to 40 characters) appear on lists of records and in the Funds list displayed at the top of a notification record. Selectors use the Funds list within the record to specify funds for purchasing selected materials. If you **do not** enter a description, the system displays fund codes instead.
Example: if your code for Art History is **123-AH**, enter **123-AH** as the code to include it in the MARC record and enter **Art History** as the description. Then selectors can see the description instead of the code.

Action	Procedure
Go to the Funds screen	From another tab: Click the Administrator tab or press <Alt><A>. From another Administrator screen: Click Funds or press <Alt><D>.
Add a fund	In an empty row at the top of the list, type the code and description (up to 40 characters) for the fund you want to add. Click Save or press <Alt><V>.
Delete a fund	Click the Delete button next to the listing for the fund you want to remove.
Edit fund code or description	Change the fund code and/or description. Click Save or press <Alt><V>.

Specify institution locations (optional)

- Add or delete locations, and update location codes or descriptions to keep the list current. Include as many locations as you need.
- **Note:** On the Institution Detail screen, you can choose to require selectors to designate a location before taking the **Select** action.

- On the Selector Preferences screen, selectors view the full list of locations and then choose locations to include in the Locations list displayed at the top of notification records.
- **Location codes** are actual codes that appear in exported MARC records. If you enter a description for each location, the description appears in the Locations list within notification records. However, if you **do not** supply descriptions, the codes appear instead. To export location data, you must specify a MARC field and subfield to contain location codes. (Use the Institution Detail screen to specify MARC fields and subfields for data from notification records that you want to retain in exported records.)
- **Location descriptions** (limited to 40 characters) appear in the Locations list displayed at the top of a notification record. Selectors use the Locations list within the record to specify a location to receive selected materials. If you do not enter descriptions, the system displays location codes instead.
Example: if your code for the Business Law collection is **BULW**, enter **BULW** as the code to include it in the MARC record and enter **Business Law** as the description. Then selectors can see the description instead of the code.

Action	Procedure
Go to the Locations screen	From another tab: Click the Administrator tab or press <Alt><A>. From another Administrator screen: Click Locations or press <Alt><T>.
Add a location	In an empty row at the top of the list, type the code and description (up to 40 characters) for the location you want to add. Click Save or press <Alt><V>.
Delete a location	Click the Delete button next to the listing for the location you want to remove.
Edit location code or description	Change the location code and/or description. Click Save or press <Alt><V>.

Define collection areas

- Collection areas are subject categories you define to enable automatic routing of notification records that do not include selector names.
- To define a collection area, you specify criteria (including call number ranges, keywords/phrases, and fixed-field values) for matching records to a particular subject category.
- Set up as many areas as you need, and assign each area to up to 5 selectors. The system routes records that match an area to all assigned selectors.
- Use the Collection Areas screen to name each area (up to 20 characters) and assign selectors. Use the Record Distribution screen to specify **record-matching** criteria.
- You can define criteria based on call number ranges, keywords/phrases, and/or fixed-field element values to identify and distribute records to each collection area.

WorldCat Selection Administrator Setup Guide

Action	Procedure
Go to the Collection Areas screen	From another tab: Click the Administrator tab or press <Alt><A>. From another Administrator screen: Click Collection Areas or press <Alt><S >.
Add a collection area	In an empty row at the top of the list, type the name for the collection area (up to 20 characters). To assign selectors, choose name(s) (up to five) from the lists. (Each list includes all authorized selectors.) Click Save or press <Alt><V>.
Delete a collection area	In the listing for the collection area you want to remove, click Delete . When asked to confirm the Delete action, click OK to remove this collection area or click Cancel if you decide to keep the area in the list. Click Save or press <Alt><V>.
Edit area name or selector assignments	Change the area name and/or the selectors assigned to this area. Click Save or press <Alt><V>.
View record-distribution criteria defined for a collection area	In the Action column, click the View button next to the area name. A Collection Area Summary screen appears. The Summary provides the following information: <ul style="list-style-type: none"> Collection area name Selectors assigned to the area Criteria defined for matching records for routing to this area: <ul style="list-style-type: none"> Fixed-field element values Call number ranges Keywords or phrases

Automate record distribution

Use the Record Distribution screen to access a group of single-purpose screens for setting up automated distribution of notification records to selectors. WorldCat Selection provides the following automation options:

- Distribute records to collection areas (and to selectors for each area) by associating the following characteristics with up to five collection areas:
 - Call number within a defined range
 - Keyword or phrase found in defined field(s) and subfields
 - Predominant Language (008 bytes 35--37)
 - Country of Publication (008 bytes 15--17)
 - Date (008 bytes 07--10)
 - Government Publication (008 byte 28)
 - Material Type (values for Type and BibLvl)

Use the Record Distribution screen

Action	Procedure /Note /Example
Go to the Record Distribution screen	Click the Administrator tab or press <Alt><A>. Then click Distribution or press <Alt>.
Access subscreens	The Record Distribution screen lists subscreens for setting specific record-distribution options. To access each option, click the link to the option you want or press the shortcut key.
Specify the criterion (record characteristic)	The procedure varies with the type of criterion you are defining: <ul style="list-style-type: none"> Call number range: In the Range Start and Range End boxes, type the call numbers that begin and end the range. Keyword or phrase: Type the text to match in the entry box and then specify a field tag (or tag range) and subfield code to define where the text must appear in matching records. Fixed-field element value: <ul style="list-style-type: none"> For Lang, Ctry, and GPub, supply a MARC code by selecting from a popup list or typing the code in the entry box. For Date, type the four-digit year, an open-ended range (-yyyy or yyyy-) or a closed range (yyyy-yyyy). For Material Type, select the name of a MARC format from the list or type the name in the box.
Associate criterion with collection areas	In the Collection Areas column, select up to five collection areas to associate with each call number range, keyword or phrase, or fixed-field element value. Open the list of your collection areas and click the name of the area you want.
Save to add entries	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>.
Back to Record Distribution screen	To return to the Record Distribution screen, click Back to List or press <Alt>.

WorldCat Selection Administrator Setup Guide

Action	Procedure /Note /Example
Move to another option screen	To go directly to another option screen, click Previous or Next (or press <Alt><P> or <Alt><N>).
Move among screens in multipage lists of call number ranges or keywords	Use the jump bar (top or bottom of each screen of the list). The jump bar provides: <ul style="list-style-type: none"> • Page number buttons Jump to specific page) • Arrow buttons Jump to the next/previous, first/last screen • Double-arrow buttons Jump forward or back 10 screens • Question-mark button. Use when revising entries, to help you decide which screen to jump to. Click the question mark to view a list of the first entry on each screen.

Distribute records by call number ranges

Note: Record distribution by call number is based on the call number data available in WorldCat at the time the records are distributed. In many cases, records do not include LC call numbers but **do** include Dewey numbers. Even if you do not catalog using Dewey at your library, OCLC recommends that you include the 082 and 092 in your call number priority order and define Dewey ranges in your call number ranges. Although many WorldCat records contain only 3 digit Dewey numbers, when entering your Dewey call number ranges, OCLC recommends that you include .99999 on the end of ranges to be sure to catch numbers that include more than 3 digits, such as 336-339.99999.

Tip: Use the Dewey Summaries when defining Dewey call number ranges. Refer to the list of the DDC Summaries, the three levels of classes and their 3-digit class numbers, on the OCLC Web site at < <http://www.oclc.org/dewey/resources/summaries/deweysummaries.pdf> >. Or print the PDF document for offline reference.

Note: Distribution by call number range is more efficient when you establish call number priorities that determine how Selection searches records for the call number types you use to define ranges used to match records with collection areas. See the first step in the following procedure.

	Action
1	<p>Set priority order for call number fields used to match records to collection areas that you define by call number ranges.</p> <p>Use the Call Number Fields screen to specify preferred call number types for record distribution. Selection checks records for call number fields in the order you specify.</p> <ol style="list-style-type: none"> 1 On the Record Distribution screen, click Call Number Fields Used for Assignments or press <Alt><1>. 2 Set a priority: To select a field for any priority level, open the list of tags and click the tag you want. You can define up to six tags in priority order. <p>Call number fields: You can assign a priority to any of the following call number fields:</p> <ul style="list-style-type: none"> • 050 -- Library of Congress Call Number • 055 -- Classification Number assigned in Canada • 060 -- National Library of Medicine Call Number • 082 -- Dewey Decimal Classification Number • 090 -- Local LC-Type Call Number • 092 -- Local Dewey Call Number • 096 -- Local NLM-Type Call Number <p>Default: For First Choice, 050. For Second Choice, 090. For other priority levels, the default value is blank.</p>
2	<p>Use the Call Number Ranges screen to specify call number ranges that correspond to collection areas.</p> <p>Each range can be associated with up to 5 collection areas.</p> <ol style="list-style-type: none"> 1 On the Record Distribution screen, click Call Number Ranges or press <Alt><2>. 2 Add a call number range. In the blank entry boxes at the top of the screen, type a call number in the Range Start and Range End boxes. 3 Associate range with collection areas. In the Collection Areas column, select up to five collection areas to associate with the range. Open the list of your collection areas and click the name of the area you want. 4 Save the new entry. Click Save or press <Alt><V>. <p>Example call number ranges and associated collection areas. See the table that follows this procedure.</p>
3	<p>Associate call number range with collection areas.</p> <p>In the Collection Areas column, select up to five collection areas to associate with the range.</p> <p>Open the list of your collection areas and click the name of the area you want.</p>

Example call number ranges and associated collection areas:

Call Number Range	Collection Areas
HD1 - HD27	BusinGrad, BusinGradmin
HD28 - HD30	BusinGrad, BusinGradmin, MainBus

WorldCat Selection Administrator Setup Guide

Call Number Range	Collection Areas
HD31 - HD31	BusinGrad, BusinGradmin, MainBus, Labor
HD32 - HD58.6	BusinGrad, BusinGradmin, MainBus
HD58.7 - HD59	BusinGrad, BusinGradmin, MainBus, Labor

Distribute records by keywords or phrases

	Action
1	<p>Automate record distribution by keywords.</p> <p>Use the Keywords or Phrases screen to specify keywords that correspond to collection areas and indicate the record fields (with subfields if desired) to check for each keyword or phrase. On the Record Distribution screen, click Keywords or Phrases or press <Alt><3>.</p>
2	<p>Add a keyword or phrase.</p> <p>In the blank entry at the top of the screen, 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.</p> <p>Right truncation. To match any variation of a word or phrase, use right truncation. Type the beginning of the word or phrase followed by *. You must enter at least 2 characters before the truncation symbol.</p> <p>Example keywords and associated areas:</p> <p>Economist -- 260 field -- route to selectors for BusinGrad. Mexico -- 260a -- route to selectors for LatinAmerStud.</p> <p>Example truncated keywords:</p> <p>To match the words economics, economist, economy, etc. enter the keyword as: econom*</p> <p>To match stock market or stock markets, enter the phrase as: stock market*</p>
3	<p>Specify fields. In the Tag(s) box, type a three-digit MARC tag or a range of tag numbers.</p> <p>Range of fields. Indicate ranges with hyphens.</p> <p>Example: To specify all 5xx fields, enter 500-599.</p> <p>Whole record. Enter: 000-899.</p>
4	<p>Specify subfields. Enter a single one-character subfield code. If you do not specify a subfield, the system searches all subfields.</p>
5	<p>Associate the keyword or phrase with collection areas.</p> <p>In the Collection Areas column, select up to five collection areas to associate with the range.</p> <p>Open the list of your collection areas and click the name of the area you want.</p>

Tip: Distribute records by vendor data

If you have defined vendor data that maps to your collection areas, you can distribute records based on specific elements in vendor data. To do this, set up keyword distribution criteria in which the keyword is the text for a specific item in vendor data and the field and subfield match to the field/subfield in which the text appears in records the vendor supplies to OCLC. The following table lists active Selection vendors, types of data each vendor supplies, and the field/subfield used for each data element:

Vendor Name	Data Type	MARC Field and Subfield
Aux Amateurs	Fund	962c
Aux Amateurs	Profile	962b
Aux Amateurs	Vendor Customer ID	962a
Blackwell (US or UK)	Subprofile Name	981a
Blackwell (US or UK)	Vendor Customer ID/ Profile Name	981z
Casalini libri	Vendor Customer ID	920a
CIBTC (China International Book Trading Corporation)	Vendor Customer ID	910d
CNPIEC (China National Publications Import & Export (Group) Corporation)	Vendor Customer ID	910b
Coutts	Fund	960u
Coutts	Profile	910d
Coutts	Vendor Customer ID	910b
D. K. Agencies	Profile	991c
D. K. Agencies	Vendor Customer ID	991a
East View	Profile	910p
East View	Vendor Customer ID	910b
Erasmus Boekhandel BV	Vendor Customer ID	910d
Harrassowitz	Fund	960u
Harrassowitz	Vendor Customer ID	910d
Howard Karno Books	Vendor Customer ID	930a
Leila Books	Vendor Customer ID	910b
Librairie Erasmus	Vendor Customer ID	910d
Lindsay & Croft	Fund	903e
Lindsay & Croft	Subaccount	903d
Lindsay & Croft	Vendor Customer ID	903a
Touzot	Fund	981b
Touzot	Vendor Customer ID	910d

WorldCat Selection Administrator Setup Guide

Vendor Name	Data Type	MARC Field and Subfield
YBP	Fund	903e
YBP	Subaccount	903d
YBP	Vendor Customer ID	903a

For example, if your vendor customer ID for Harrassowitz is **XXXXX**, and the ID matches to a collection area for **History**, define the following keyword criteria:

Keyword or phrase - XXXXX

Tag ----- 910

Subfield ----- d

Collection Areas ---- History

Distribute records by fixed-field element values

You can specify one or multiple values for each element and associate each element/value criterion with up to five collection areas. If you specify multiple values, the system routes records that contain any of the values.

Fixed-field elements for record distribution:

- Predominant Language (008 bytes 35--37)
- Country of Publication (008 bytes 15--17)
- Date (008 bytes 07--10)
- Government Publication (008 byte 28)
- Material Type (values for Type and BibLvl)

Language of the work (fixed-field Lang element)

Action	Procedure /Note /Example
Go to the Language screen	On the Record Distribution screen, click Language or press <Alt><4>.
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.

Action	Procedure /Note /Example
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.
Associate language criterion with collection areas	In the Collection Areas column, select up to five collection areas to associate with each element value. Open the list of your collection areas and click the name of the area you want.

Country of publication (fixed-field Ctry element)

Action	Procedure /Note /Example
Go to the Country of Publication screen	On the Record Distribution screen, click Country of Publication or press <Alt><5>.
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.
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.
Associate country criterion with collection areas	In the Collection Areas column, select up to five collection areas to associate with each element value. Open the list of your collection areas and click the name of the area you want.

Year(s) of publication

Action	Procedure /Note /Example
Go to the Date or Date Range screen	On the Record Distribution screen, click Date or Date Range or press <Alt><6>.
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. <ul style="list-style-type: none"> One year: nnnn (Example: 2002) Range of years: nnnn-nnnn (Example: 2000-2002) Years following a specific year: nnnn- (Example: 2002-) Years preceding a specific year: -nnnn (Example: -2002)
Associate year criterion with collection areas	In the Collection Areas column, select up to five collection areas to associate with each element value. Open the list of your collection areas and click the name of the area you want.

Government publication type (fixed field GPub element)

Action	Procedure /Note /Example
Go to the Government Publication screen	On the Record Distribution screen, click Government Publication or press <Alt><7>.
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. Note: The code for Not a government publication is # (pound sign). To specify this value, on the popup window select Not a government publication . Or type # in the Code 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.

Action	Procedure /Note /Example
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.
Associate document type criterion with collection areas	In the Collection Areas column, select up to five collection areas to associate with each element value. Open the list of your collection areas and click the name of the area you want.

Type of material (MARC format)

Action	Procedure /Note /Example
Go to the Material Type screen	On the Record Distribution screen, click Material Type or press <Alt><8>.
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.
Associate material type criterion with collection areas	In the Collection Areas column, select up to five collection areas to associate with each element value. Open the list of your collection areas and click the name of the area you want.

Support

How to get assistance

Contact OCLC

Phone: (support in English, Spanish and Portuguese).
Hours: 7:00 am—9:00 pm U.S. Eastern time, Monday-Friday.
USA: 1-800-848-5800
International: 1-614-793-8682

Fax: 1-614-764-2694

E-mail: connexion-support@oclc.org

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

System alerts

System Alerts page (all OCLC services):
<http://www.oclc.org/support/systemalerts/>