# Selection Quick Reference: Admin Setup Overview

## Access WorldCat Selection

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

## Identify and define users (Admin)

### Request authorizations

- Send a list of users and Selection privileges (e.g., Admin, Selector, Acquisitions) to OCLC via e-mail; include the desired password for each user (note that passwords are limited to 9 characters). If you have several users, OCLC can provide a spreadsheet to help with this task.
- Identify current Connexion users so that OCLC can add Selection to their existing authorizations.
- OCLC processes requests for new authorizations and authorization changes daily.

### Define user names

After your authorizations have been added to WorldCat, please do the following:

| | Action |
|---|---|
| 1 | Log on to Selection. |
| 2 | At the top of the screen, click the **Administrator** tab. |
| 3 | On the Administrator tab, click **Users**. |
| 4 | On the User List screen in the **Selection Name** column, enter the name (up to 40 characters) associated with each authorization, as you want it to display. For example, this name appears in the Forward To list, which shows names in alphabetical order. 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. |

### Designate default selector

- Designate one user as the default selector.
- The default selector receives notifications that do not match criteria (such as call number ranges, keywords, or phrases) for an established collection area or that have been excluded by all selectors. If possible, the default selector should not be a selector who receives regular titles.
- Hint: If the default selector must be a selector who receives regular titles, he or she may want to consider having a different authorization number for their default status, so that not all records appear in the same inbox.

## Define collection areas (Admin)

### About collection areas

- Collection areas are used to route notification records.
- You can define as many collection areas as you need for efficient routing: there is no limit.

| | Action |
|---|---|
| 1 | On the Administrator tab, click **Collection Areas.** |
| 2 | Enter a name for each collection area; for example, History, Law, China, German, etc. |
| 3 | Assign up to five selectors to each collection area. |
| 4 | When finished, click Save or press <Alt><v>. |

## Define record distribution criteria (Admin)

### About record distribution

- Distribute records by:
  —Keywords or phrases using customer ID or profile
  —Call number ranges
  —Fixed field element values
- Associate a call number range, or a keyword or phrase, with up to five collection areas.

| | Action |
|---|---|
| 1 | On the Administrator tab, click **Distribution.** |
| 2 | Click the type of criteria you want to define. |
| 3 | When finished, click Save or press <Alt><v>. |

# Define funds and locations (Admin)

## Define funds and locations

- Set up funds and locations to allow selectors to specify the fund for purchasing a selected item or to specify the location that will hold the item.
- Define the fund and location codes that will be included in the exported records, as well as an optional description for each that will display in the lists. Descriptions should be used if the fund or location code is not self-explanatory. If the fund or location description is left blank, the code will be used in the MARC records and in system displays.
- Similar procedures are used to define funds and locations.

| | Action |
|---|---|
| 1 | On the Administrator tab, click **Funds** or **Locations**. |
| 2 | Enter fund and/or location codes and optional descriptions. |
| 3 | **Optional:** To require that all selected records specify a fund or location:<br>1. On the Administrator tab, click **My Institution**.<br>2. Select **Yes** for either (or both) **Require Fund on Select** and **Require Location on Select**. |
| 4 | When finished, click Save or press <Alt><v>. |

# Institution options (Institution Detail screen) (Admin)

## Access the Institution Detail screen

On the Administrator tab, click **My Institution**.

## Other symbols and groups

| If your institution | On the Institution Detail screen |
|---|---|
| Has holdings in WorldCat under multiple OCLC institution symbols | In the **Other Institution Symbols** box, type the additional symbols. Use semicolons to separate the symbols. |
| Shares selection decisions with other libraries in a group | In the **Group Institutions** box, type the symbols for the libraries in the group.<br>**Note:** Each library in the group must specify the institution symbols for all other group members. |

## Export-related options

| | Action |
|---|---|
| 1 | Enter the **default holding library code**. |
| 2 | If using manual export, specify the default file name to be used. **Note:** Acquisitions staff can change this when they begin exporting files of selected records. |
| 3 | Export Fields section<br>Use this area to specify a MARC field and subfield in which you want vendor and selection information to appear in exported records. |
| 4 | Custom Vendor Names section<br>Below the Export Fields area is a table listing your active vendors.<br>1. If you want the vendor name as displayed in Selection, use step 3 above. If you require a custom form of the vendor name, specify the text (name and/or code) to use to identify the vendor in exported MARC records.<br>2. For each vendor, enter the MARC field tag and subfield code to contain the vendor name/code.<br><br>**Note:** To include vendor names in exported records, you **must** specify the field/subfield to contain the information. |

## FirstSearch and Open URL

- **Link to WorldCat records via FirstSearch.** A link to WorldCat.org is automatically included. If your selectors prefer FirstSearch, they can enable a link from a notification record in Selection to the corresponding WorldCat record by entering the required FirstSearch authorization and password.
- **Link to local catalog via Open URL.** To enable a link from the author, title, or ISBN fields in a notification record to the corresponding record in your local online catalog, enter the URL for your link resolver.

## Custom user-defined fields

Notification records can contain up to three customized note fields.

- Supply the label field and (optionally) default content (up to 500 characters); decide whether to include the custom note fields in exported records, and define how to map the custom fields to MARC fields and subfields.
- For each field, type a label (up to 60 characters) and the text (up to 500 characters) in the boxes provided.
- Custom note fields are displayed in each notification record. You can also include the notes in exported records if appropriate.
- Selectors can change the field content; the field label is read-only.

### Preferred call number types

- Use the **Call Number in Lists** section to specify the call number types you want displayed in lists of notification records.
- Select and assign priorities to the following call number fields: 050, 055, 060, 070, 082, 086, 090, 092, and 096.

### Automatic deletion of records

| | Action |
|---|---|
| 1 | Use the **Delete Notification Items** area to define the number of days to retain notification records in each folder.<br>After a record remains in a folder for the specified number of days, the system removes the record automatically. |
| 2 | You can either:<br>Accept the default retention time for each folder.<br>Or, specify a preferred retention limit, within a system-defined range. |

| 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 |

### Automatically remove duplicate records

- Use this option to automatically remove duplicate copies of notification records from Inbox folders for all selectors.
- 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**.
- 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.
- 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's Inbox contains 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.
- If the removal option is **on**, a daily process identifies duplicate records in each Inbox and deletes the records. The process scans other folders to determine if a record in the Inbox duplicates a record already received by the selector. Records are deleted from the **Inbox only**.

| 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.<br>To reposition one vendor name, select the name and then click **Move Down** or **Move Up**<br>To reposition multiple names, select the names you want and then click **Move Down** or **Move Up.** They selected names need not be adjacent.<br>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.<br>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. |

### Vendor customer IDs

- At the bottom of the screen, review the IDs listed for each of your vendors.
- Verify that each ID is correct, and that the list includes all currently used IDs, and no obsolete IDs.
- If you notice an error, contact OCLC to request a correction.

## Acquisitions export settings (Acquisitions)

### Go to Export Settings screen

Click the Acquisitions tab. Then click **Export Settings.**

### Select delivery destination for export files

| | Action |
|---|---|
| 1 | In the Export Delivery area, specify your preferred location for file delivery:<br>**Online** (default setting)<br>Files of exported records are stored online at OCLC for 30 days.<br>Retrieve the files from the Download Export Files screen.<br>**FTP and Online**<br>Files of exported records are stored in your institution’s folder on an OCLC FTP server for 90 days.<br>Use an FTP client or custom script to monitor this folder and transfer export files to your site, enabling you to load the records into your ILS.<br>Files are also stored online at OCLC for 30 days and are available from the Download Export Files screen. |
| 2 | Click **Save** or press <Alt><v>. |

### Select export method

| | Action |
|---|---|
| 1 | In the Export Method area, specify **Manual** or **Automatic**:<br>**Manual export** (default setting)<br>Use the Selected Items screen to specify which records to export. Then click **Export Selected Records**.<br>**Automatic export** Select one of the three options:<br>**Automatic - All records in one file** Creates one export file that contains all records currently selected.<br>**Automatic - Separate files per fund** Creates separate export files; each file contains selected records associated with one fund.<br>**Automatic - Separate files per vendor** Creates separate export files; each file contains selected records from one vendor.<br>File name will vary based on options selected. |
| 2 | Click **Save** or press <Alt><v>. |

## Selector options (Selector)

### Selector Preferences

- **View selector preferences.** Click the **Preferences** tab.
- Selectors use this screen to customize display of lists and records and to streamline common tasks:
  —Set options for automatically rejecting notification records
  —Supply a return e-mail address
  —Set a preferred sort order for record lists
  —Create a list of reasons for deferring action notification records
  —Specify the funds and locations for which they select items

### Selector exclusion criteria

- **View selector exclusion options.** On the Preferences tab, click **Selector Excludes**.
- Selectors use this screen to define criteria for excluding notification records from their inboxes. They can set up criteria based on:
  —Keywords or phrases
  —Language
  —Country of publication
  —Date
  —Government publication type
  —Material type
  —Vendor
- Criteria operate by;
  —Excluding **only one** specified characteristic
  —Or, excluding **all but one** characteristic
- Examples:
  —Exclude **only** sound recordings
  —Exclude **all** languages **but** German

## Support

Contact OCLC
Phone: (support in English, Spanish and Portuguese).
Hours: 7:00 am—9:00 pm U.S. Eastern time, Monday-Friday.
USA: 1-800-848-5800
International: 1-614-793-8682
Fax: 1-614-764-2694
E-mail: connexion-support@oclc.org
Web: <https://www3.oclc.org/app/contac/>