

Selection Quick Reference: Selector Activities

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>. 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. 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: <ul style="list-style-type: none"> • 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.

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.

Manage folders and records

Inbox and related folders

- **Inbox:** Records arrive in the Inbox when the vendor notifies you that a title is available. 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
Entire list	Press <PgDn> or <PgUp>. Or Use the scroll bar (right side of screen) or the scroll wheel on your mouse.
Full record	Click the entry number. Or Type the entry number in the Record box and press <Enter>.
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.

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Action	
1	Display the folder list that includes the records to send via e-mail.
2	<p>Flag (mark) the record(s) to include in the e-mail message.</p> <p>Flag: Click the check box next to the item number.</p> <p>Unflag: Click the box again to remove the check mark.</p> <p>Flag all: Click the check box above or below the item number column.</p> <p>Unflag all: Click the box again to remove all check marks.</p> <p>Note: You can flag up to 250 records.</p>
3	Click the E-mail button (top right).
4	<p>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.</p> <p>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.</p>
5	<p>The Include Me option is selected by default; the system sends a copy of the message to your e-mail address.</p> <p>If you prefer not to receive a copy of the message, clear the check box.</p> <p>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.</p>
6	<p>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).</p> <p>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.</p> <p>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.</p>
7	<p>(Optional)</p> <p>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.</p>

Action	
8	Review the message and make corrections or additions, if needed.
9	<p>Click E-mail (or press <Alt><M>) to send the message including the notification records you flagged.</p> <p>Or</p> <p>Click Cancel to discard the message and close the Send Record via E-mail dialog.</p> <p>Result:</p> <p>The system sends the message to the specified recipients. The dialog closes and the system redisplay the folder list from which you flagged records to send via e-mail.</p> <p>The confirmation message E-mail successfully sent appears in a gray information bar at the top of the folder list.</p> <p>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.</p>

Take actions on records from a list

Note: Fund and/or Location may be required on Select action.

Single record. If this requirement is in effect, you cannot select a record without specifying a Fund and/or Location.

Flagged records on a list. If you take the Select action on multiple flagged records, records missing a Fund/Location are unflagged. Other records remain flagged, but not selected. Supply the Fund/Location in the unflagged records, reflag them, and then repeat the Select action.

Action	
1	Display the folder list that includes the records on which to take action.
2	<p>Flag (mark) the record(s) to process.</p> <p>Flag: Click the check box next to the item number.</p> <p>Unflag: Click the box again to remove the check mark.</p> <p>Flag all: Click the check box above or below the item number column.</p> <p>Unflag all: Click the box again to remove all check marks.</p>
3	<p>To Forward records, in the Forward To list, click the name of the selector you want to receive the record(s). (Required)</p> <p>To Defer records, you can specify a reason for deferring. In the Deferred Reason list, click the reason you want. (Optional)</p>
4	<p>On the Action list, click Select, Reject, Defer, or Forward.</p> <p>Results: Processed records move from the Inbox to your Selected, Deferred, Forwarded to Others, or Rejected folder, and/or to another selector's Forwarded to Me folder.</p>

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Customize the list

Customize	Procedure
Columns included	<p>Hide a column: At the bottom of the screen, click the box for that column to remove the check mark. Note: You cannot hide the Title column.</p> <p>Show a hidden column: Click an empty box to restore the check mark.</p> <p>Default: Show all columns.</p>
Records per screen	<p>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.</p> <p>In the Records per Screen list, click 1000 or 250 or 100 or 25.</p> <p>Default: 25 records per screen.</p>
Record sorting	<p>Change sort: Click a column heading to re-sort the list on that column.</p> <p>Change default sort: In Selector Preferences, specify a new default sort order (primary and secondary sort).</p> <p>Default: Sorted by Added date (primary) and then by Source (secondary).</p>
Record data shown	<p>To show all data, at the bottom of the screen, in the Data Values list, click Show All Data.</p> <p>Truncate list data: In the Data Values list, click Truncate Data.</p> <p>Default: Data truncated to maximum column widths so all columns fit across the screen.</p>

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, click the Searching tab or press <Alt><R>.
- 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>.

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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	Source name Note: Keyword searching is not available for this index. Enter the complete text of the source or use truncation.	Harrassowitz Aux Amateurs Aux*
Deferred Reason	Text supplied by user Note: Keyword searching is not available for this index. Enter the complete text of the reason or use truncation.	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 redisplay 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>.

Edit and process 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
- Other information may appear in the record:
 - **Records distributed to others.** 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 others.** 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.
 - For default selectors, information on why they received the record (either because it did not match a collection area or because the expected selectors excluded it).
 - In the Forwarded to Me folder, records include the name of the person who forwarded the record.
- You can change the institution-supplied data. Other content is read-only.

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.
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.

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Action	
7	Review the message and make corrections or additions, if needed.
8	<p>Click E-mail (or press <Alt><M>) to send the message including the text of the displayed notification record.</p> <p>Or</p> <p>Click Cancel to discard the message and close the Send Record via E-mail dialog.</p> <p>Result:</p> <p>The system sends the message to the specified recipients. The dialog closes and the system redisplay the record you sent via e-mail.</p> <p>The confirmation message E-mail successfully sent appears in a gray information bar at the top of the record.</p>

Edit records

The following table explains how to change editable content in a notification record in the Inbox, Selected, Rejected, or Deferred folder.

Note: You cannot make these changes in records after they are exported. Records in the Exported folder are view only.

Item	Procedure	Source / Notes
Price May include currency type (read-only).	<p>To change: Edit the displayed price or type the new price in the box.</p> <p>Note: The currency type (such as USD or EUR) appears if the record provides a value. This text is read-only.</p>	<p>Source: Vendor-supplied price, if any. If the vendor data does not include a price, the Price box is empty.</p> <p>Note: The vendor price (if any) also appears in the Vendor Information area.</p>
Quantity	To change: Type the number of copies in the box.	System supplied default: 1.
Fund	<p>To change: On the Fund list, click the fund you want.</p> <p>Note: Until you choose funds in Preferences, the Fund list is empty.</p>	<p>Source: Vendor-supplied fund, if among funds defined by the administrator. Or the Fund box is empty.</p> <p>After you customize the institution funds list in Selector Preferences, the list includes funds you specified.</p>

Item	Procedure	Source / Notes
Location	<p>To change: On the Location list, click the location you want.</p> <p>Note: Until you choose locations in Preferences, the Location list is empty.</p>	<p>Source: Vendor-supplied location, if among locations defined by the administrator. Or the Location box is empty.</p> <p>After you customize the institution locations list in Selector Preferences, the list includes locations you specified.</p>
Deferral	<p>To change: On the list, click the reason you want.</p> <p>Default: None</p>	<p>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.</p>
Forward To	<p>To change: On the list, click the name of the selector you want.</p> <p>Default: None</p>	<p>Source: Forward To box lists other selectors at your institution.</p> <p>OCLC supplies a list of authorized Selection users for your institution.</p>
ISBN to Export First	<p>Default: The first ISBN in the WorldCat record appears first in the exported record.</p> <p>To change: On the list, click the ISBN you want to place first in the exported record.</p>	<p>Source: WorldCat record for the item.</p> <p>If the WorldCat record contains multiple ISBNs, all ISBNs appear in the ISBN to Export First list.</p>
Note fields	To change: In each field, edit the default note or type a new note. (No note fields display unless defined by the administrator.)	<p>Source: Administrator settings for notes to display in notification records.</p> <p>Selectors can modify or replace text in each field (up to 500 characters).</p>

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View records

Action	Procedure
View other folders	<p>At the top of each screen, below the tab set, is a list of the folders that contain records.</p> <p>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>.</p> <p>Note: Only folders that contain records are listed.</p>

Save or cancel changes

Action	Procedure
Save changes	<p>Click Save. Or press <Alt><V>.</p> <p>Result: Changes are saved. The record remains open.</p> <p>Return to folder list</p> <ul style="list-style-type: none"> • Update one record: Save the record. Then click Back to List (or press <Alt>) • Refresh entire list: Click the folder name on the navigation bar (or use the keystroke).
Cancel changes	<p>Click Cancel. Or press <Alt><C>.</p> <p>Result: Changes not yet saved are reversed. The record remains open.</p>
Automatic save	<p>When you take an action, view another record in this folder, return to the record list, view another folder, or log off, the system saves and closes the displayed record.</p>

Take actions on notification records

When viewing a full record in the Inbox, Forwarded to Me, Selected, Deferred, Forwarded to Others, or Rejected folder, you can take any action.

Note: Fund and/or Location may be required on Select action. Single record. If this requirement is in effect, you cannot select a record without specifying a Fund and/or Location.

	Action
1	<p>Open the full record from the list.</p> <p>Click the entry number.</p> <p>Or type the entry number in the Record box and press <Enter>.</p>
2	Decide which action you want to take.

	Action
3	<p>To Forward the record, in the Forward To list, click the name of the selector you want to receive the record(s). (Required)</p> <p>To Defer the record, you can specify a reason for deferring. In the Deferred Reason list, click the reason you want. (Optional)</p>
4	<p>Take an action on the record: Click Select, Reject, Defer, or Forward.</p> <p>Or use the keystroke:</p> <ul style="list-style-type: none"> • Select -- press <Alt><T> • Reject -- press <Alt><R> • Defer -- press <Alt><E> • Forward -- press <Alt><W> <p>Results</p> <ul style="list-style-type: none"> • Selection adds the records to the folder that contains records with the new status. • The record closes; the next record in the folder opens.

Selector preferences

Action	
1	Click the Preferences tab. If the Selector Excludes screen appears, click Selector Preferences or press <Alt><S>.
2	<p>Provide your return e-mail address for sending records via e-mail</p> <p>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.</p> <p>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.</p>
3	<p>Under Notification List Order, customize sorting in folder lists.</p> <p>1 Primary Sort: Click the name of the record field (column) to use as the primary key. Change direction if desired.</p> <p>2 Secondary Sort: Choose the field and direction.</p> <p>Default sort order: Ascending by Added (primary sort) and ascending by Source (secondary sort).</p>
4	<p>Define reasons for deferral</p> <p>The Deferred Reasons area contains 40 text boxes in which you can enter descriptions of common reasons for deferring a selection decision.</p> <p>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.</p> <p>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.</p> <p>Add a reason: In an empty text box, type an explanation of the reason (up to 40 characters).</p> <p>Edit a reason: Add, delete, or replace text.</p> <p>Delete a reason: Clear the text of the reason you want to remove.</p> <p>Default: No system default. All text boxes are empty until you supply reasons.</p> <p>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.</p>

Action	
5	<p>The Funds area lists the funds set up by your administrator. Choose the funds allocated for the materials you select.</p> <p>Include a fund: Click the empty box; a check mark appears.</p> <p>Exclude a fund: Click the marked box; the check mark disappears.</p> <p>Default: All funds defined by the administrator are listed, but none are marked. Until you choose funds in Preferences, the Fund list provided in displayed records is empty.</p> <p>Funds area empty. If no funds are listed in Preferences, the administrator has not defined them.</p>
6	<p>The Locations area lists the locations your administrator set up for your library. Use the list to designate locations for selected materials.</p> <p>Include a location: Click the empty box; a check mark appears.</p> <p>Exclude a location: Click the marked box; the check mark disappears.</p> <p>Default: All locations defined by the administrator are listed, but none are marked. Until you choose locations in Preferences, the Location list provided in displayed records is empty.</p> <p>Locations area empty. If no locations are listed in Preferences, the administrator has not defined them.</p>
7	<p>At the bottom of the screen, click Save or press <Alt><V> to save the updated preferences.</p> <p>Cancel changes to preferences. Click Cancel or press <Alt><C> to keep your previous settings.</p>

Reject notification records on demand

- 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.

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Action	
1	<p>Reject records for materials already held. Under Reject All Notification Items, click the If Already Held button or press <Alt><H>.</p> <p>Results:</p> <ul style="list-style-type: none"> 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.
2	<p>Reject records for items selected by other selectors. Under Reject All Notification Items, click the If Selected By Others button or press <Alt>.</p> <p>Results:</p> <ul style="list-style-type: none"> The system checks other selectors' Selected and Exported folders for records that are also in your Inbox, Forwarded to Me, or Deferred folder. 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.

Record Exclusion Options

- Establishing record-exclusion criteria is **optional**.
- The system applies 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 or receive certain records temporarily to help you handle short-term assignments or special projects.
- 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)
 - Vendor (exclude all records from one vendor or from all vendors except one)

Go to the Selector Excludes screen

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

Save to retain changes

Action	Procedure
Save changes	When finished making changes on the Selector Excludes 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>.

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	<ol style="list-style-type: none"> 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	<ol style="list-style-type: none"> 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)	<ol style="list-style-type: none"> 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.
Exclude all but multiple specific characteristics (all except two or more specific languages, countries, material types, etc).	<ol style="list-style-type: none"> 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. <p>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.</p>

Action	Procedure /Note /Example
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

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*
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. Examples: All 5xx fields, enter 500-599 Whole record. Enter: 000-899 .
Examples	Economist -- 260 field Mexico -- 260a

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Exclude records by language (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, in the Exclude column, select Only . To exclude other language(s), specify each as a separate entry.
Exclude all but one language	In the Exclude column, select All But .
View official LC code list and guidelines	In the title bar for the Language area, click the question mark button (?) next to the area label.

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.

Action	Procedure /Note /Example
Exclude all but one country	In the Exclude column, select All But .
View official LC code list and guidelines	In the title bar for the Country area, click the question mark button (?) next to the area label.

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. <ul style="list-style-type: none"> One year: nnnn (Example: 2002) Range of years: nnnn-nnnn (Example: 2000-2002) Single year and all following years: nnnn- (Example: 2002-) Single year and all preceding years: -nnnn (Example: 2002)
Exclude only one year or range	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	In the Exclude column, select All But .

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.

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.

Action	Procedure /Note /Example
Exclude all but one type	In the Exclude column, select All But .
View code list and guidelines	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	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	In the Exclude column, select All But .

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. Select another vendor .

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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).

Screen section heading	Description
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).
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).

Keystrokes for selector activities

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 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 record, list, or any screen (Web browser print function).	<Ctrl><P>

Selector action	Keystroke
Actions from 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 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>

Selector action	Keystroke
Next Record	<Alt><N>
Previous Record	<Alt><P>
Back to List	<Alt>

Selector folder to view	Keystroke
Searching tab	<Alt><G>
Selector tab	<Alt><L>
Inbox	<Alt><I>
Selected	<Alt><S>
Forwarded to Me	<Alt><M>
Deferred	<Alt><F>
Forwarded to Others	<Alt><H>
Rejected	<Alt><J>
Exported	<Alt><X>

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> (from Preferences screen)
Selector Excludes	<Alt><E> (from Preferences tab)
Selector Distribution	<Alt><D> (from Preferences tab)

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

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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/>