Selection Lists

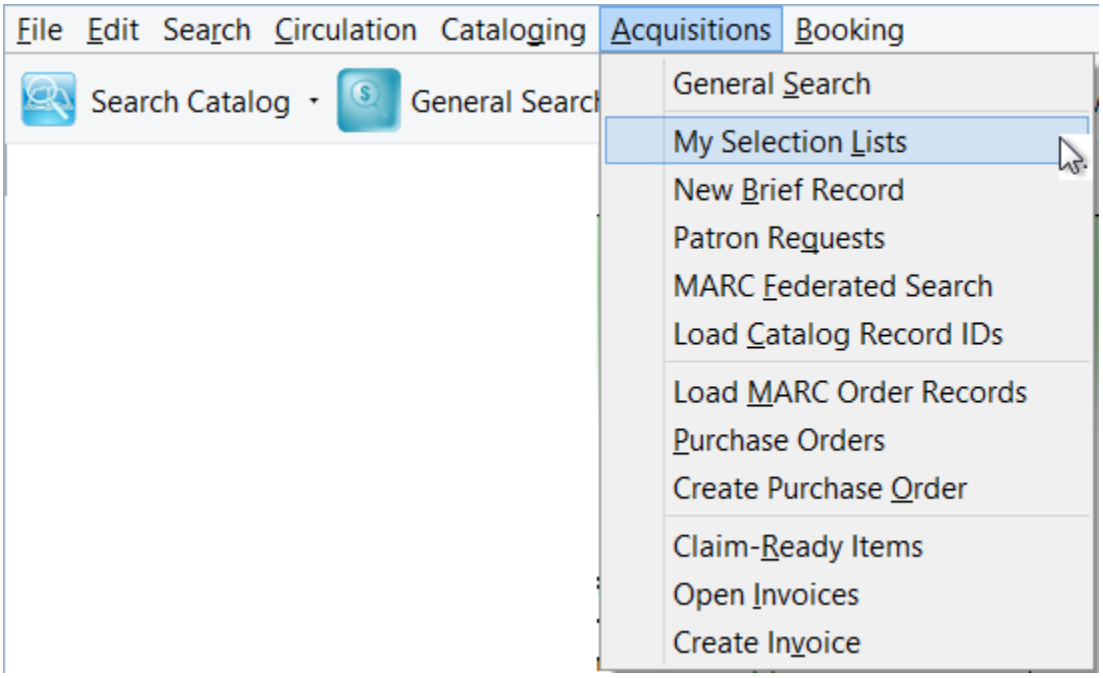
Selection lists enable users to add records from a variety of sources to a single list that can be converted into a purchase order. Selection lists can also be created to keep track of items that a library wishes to purchase in the future.

My Selection Lists

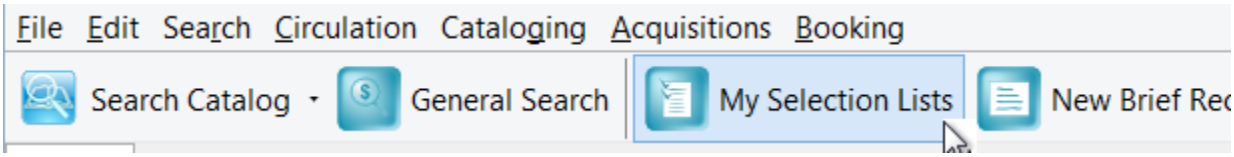
To open the *My Selection Lists* interface:

1. Select *Acquisitions→My Selection Lists* or choose *My Selection Lists* from the Acquisitions toolbar.

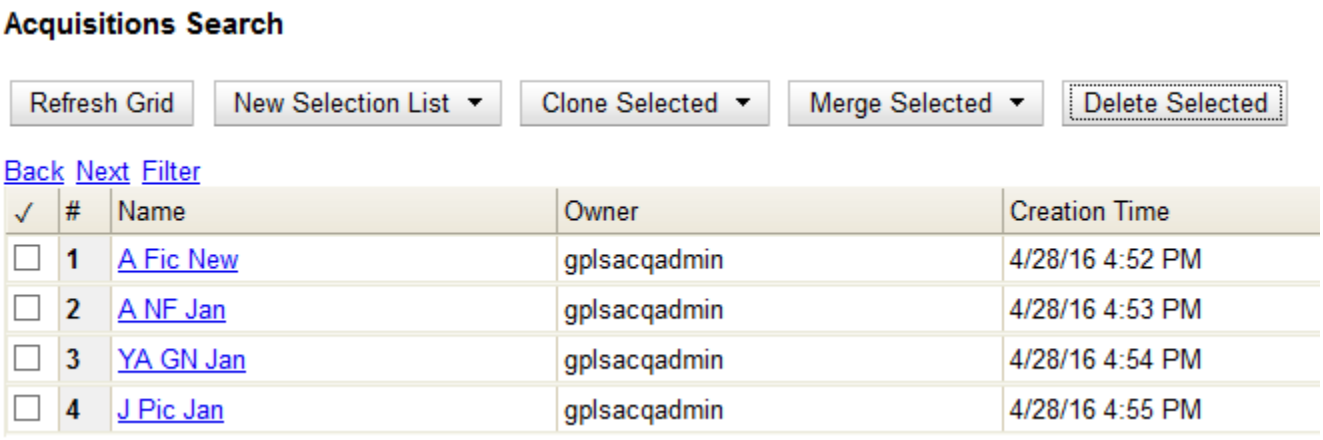
This,



or this.



2. The *My Selection Lists* interface will display.



3. The following actions can be performed from this screen:

- Open a selection list created by the user currently logged in
- Create a selection list
- Clone a selection list
- Merge selection lists
- Delete a selection list

Users will see a message saying “No results” the first time they open the *My Selection Lists* interface. The *My Selection Lists* page is created by a search for selection lists where the owner of the list is the user currently logged into the staff client. A user's very first selection list must be created before there can be results for this search.

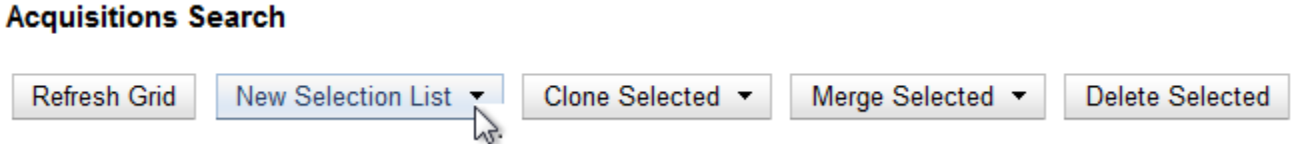
Create a Selection List

Selection lists can be created through the My Selection Lists interface. The three other areas within the module where selection lists can be created are when you Add Brief Records, Load MARC Order Records or find records through an OPAC search. In each of these interfaces, you will find the *Add to Selection List* choice. Enter the name of the selection list you would like to create into the field.

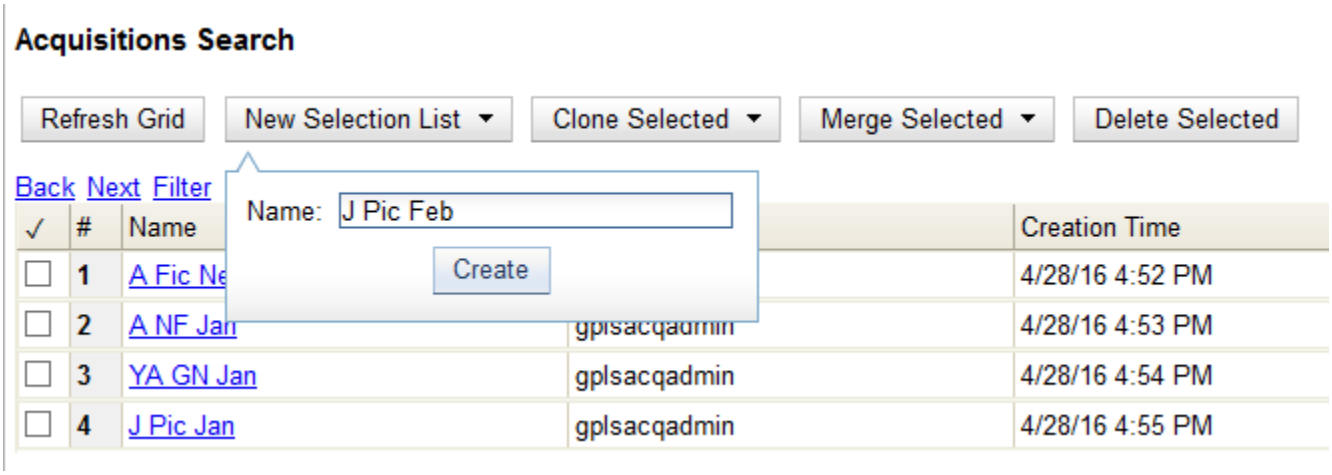
To create a selection list through the *My Selection Lists* interface:

1. Select *Acquisitions→My Selection Lists* OR choose *My Selection Lists* from the toolbar.

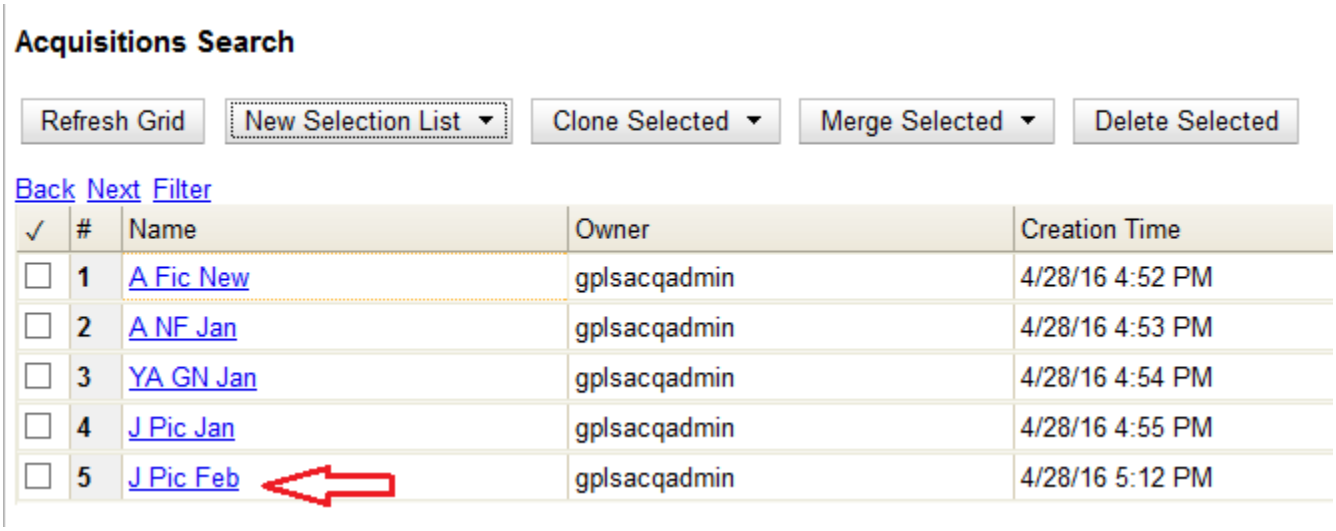
2. Click *New Selection List.*



3. Enter the name of the selection list in the box that appears and click *Create.*



4. Your new selection list will display in the list.



Add Line Items to a Selection List

You can add line items to a selection list in one of six ways:

1. Add a Brief Record
2. Search for Line Items & Catalog Records;
3. Load MARC Order Records;
4. Load Catalog Record IDs; or use the
5. View/Place Orders action in the catalog

Some of these methods for adding records to selection lists cause the system to create a selection list called *Unnamed*. This selection list is empty and can safely be ignored. It is possible to delete the list, but it will be automatically recreated as needed.

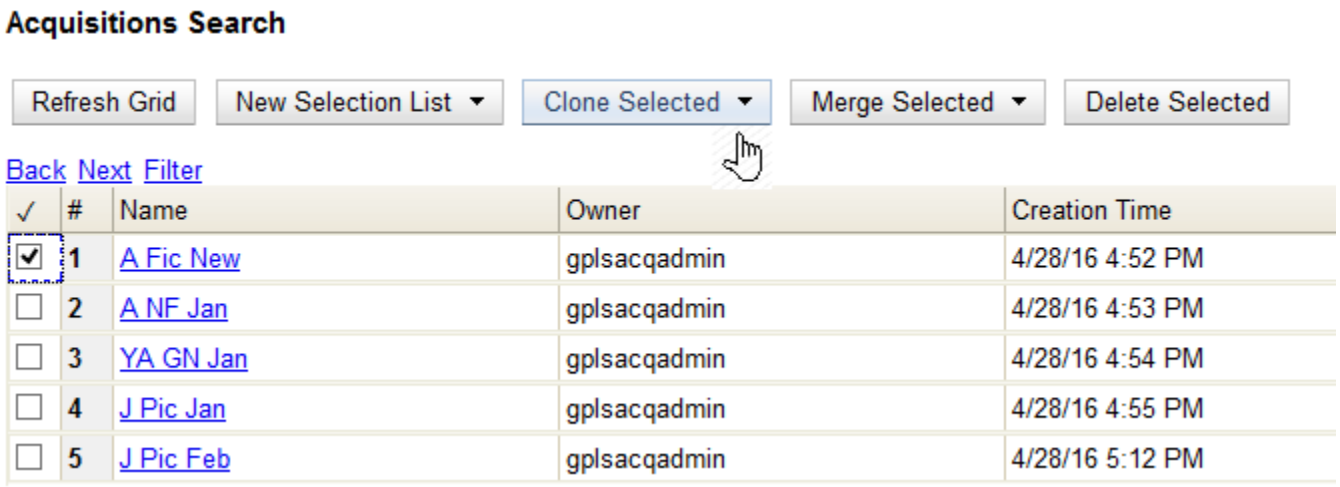
Clone a Selection List

Cloning selection lists enables you to duplicate selection lists. You can maintain both copies of the list, or you can delete the original list.

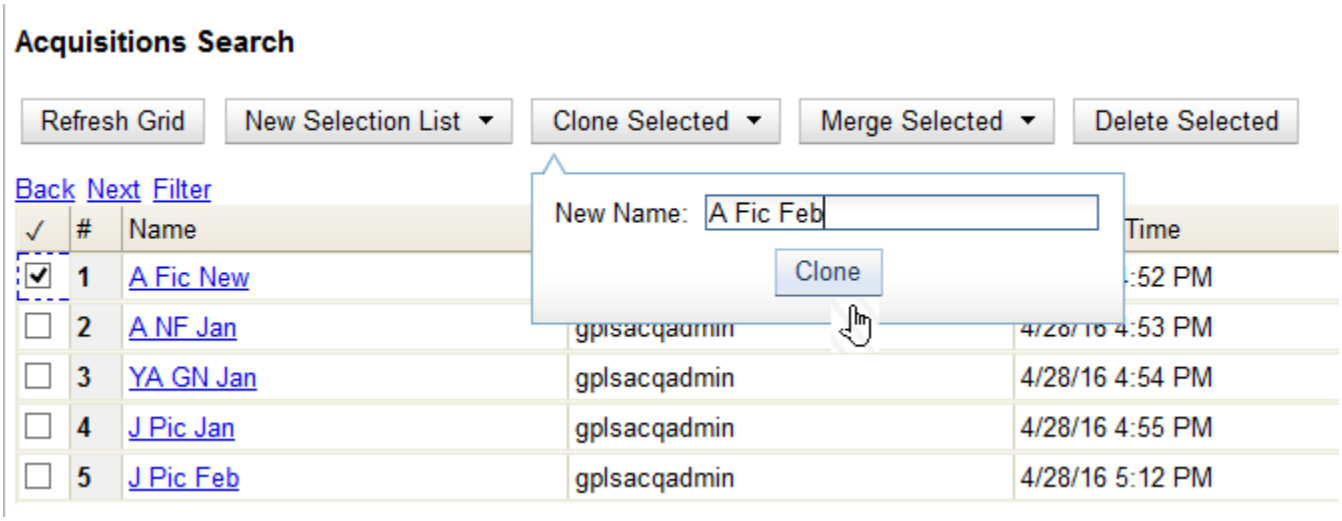
The “Save to selection list” does not copy line items to another list, it MOVES those line items and the associated copy/PO info to another selection list. To copy items to another selection list you need to go into the main selection list screen and clone the list.

1. Select *Acquisitions→My Selection Lists* OR choose *My Selection Lists* from the toolbar.

2. Check the box adjacent to the list you would like to clone and click *Clone Selected.*

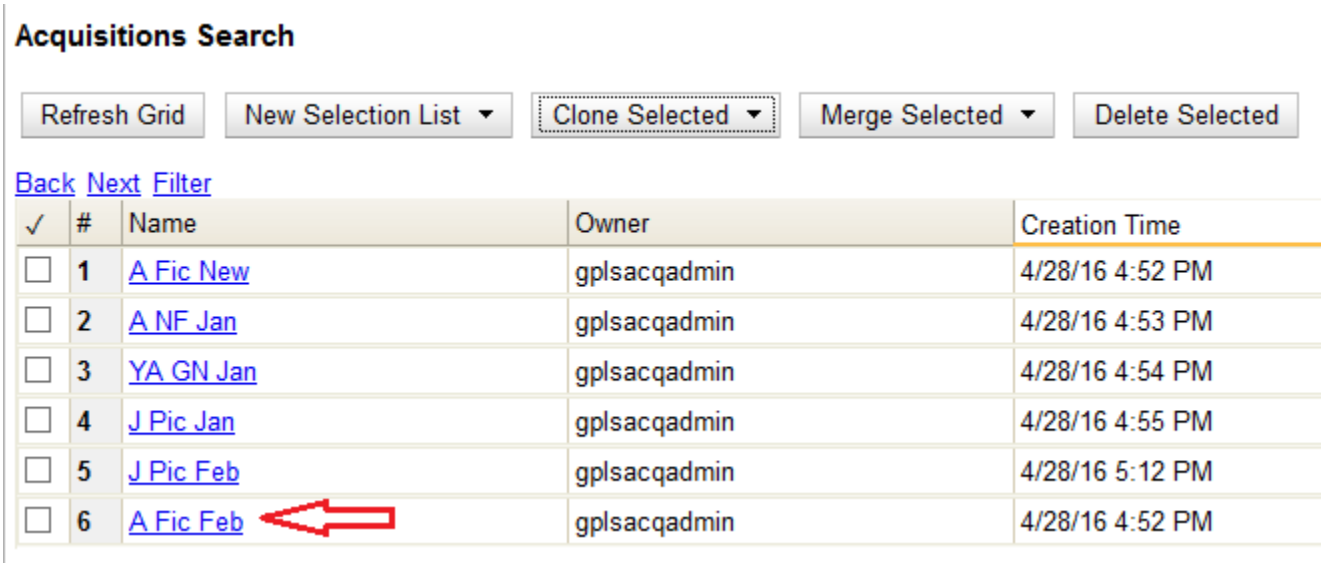


3. Enter a name for your new selection list into the box that appears and click *Clone.*



4. Your cloned selection list will display in the list. The cloned selection list contains all the line items of

the original list without any copy information.



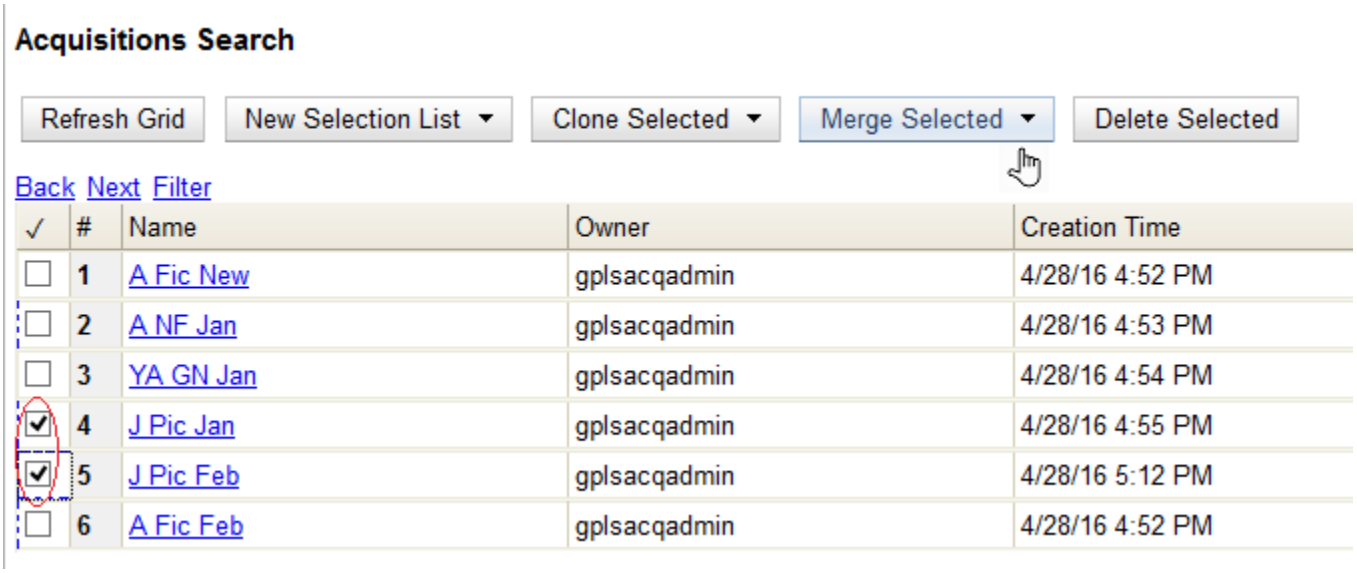
Merge or Rename Selection Lists

Merge a Selection List

Two or more selection lists can be merged into one list.

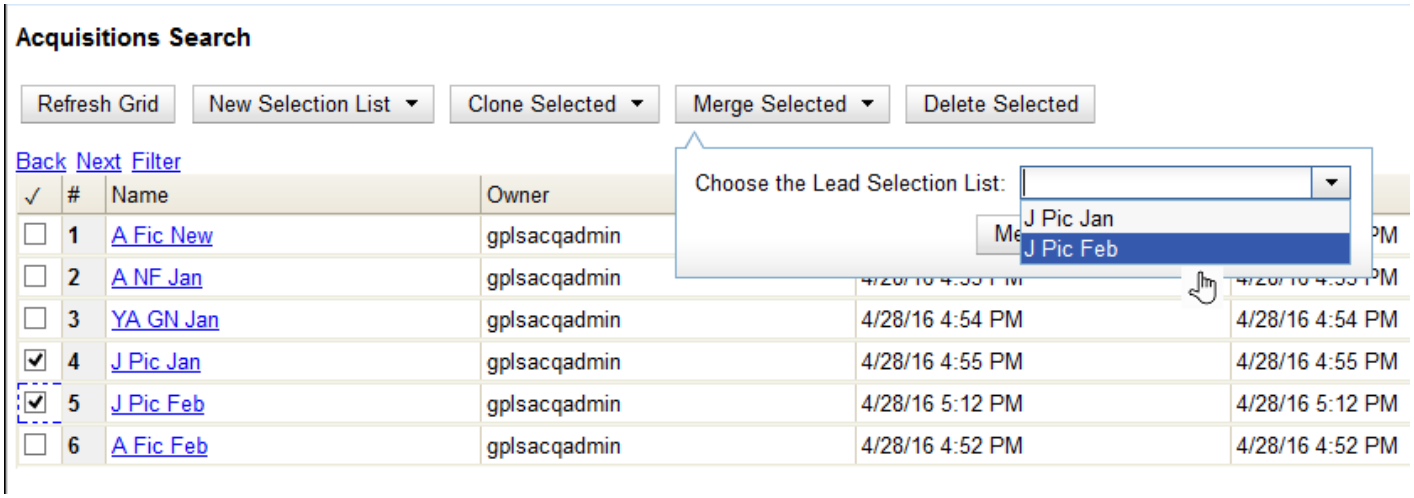
1. Select *Acquisitions→My Selection Lists.*

2. Check the boxes adjacent to the selection lists that you would like to merge together and click *Merge Selected.*



3. Choose the *Lead Selection List* from the drop down menu. This is the list to which the items on the

other list(s) will be transferred.



4. Click *Merge.*

Rename a selection list

To rename a selection list, merge it into a new list that has the new name.

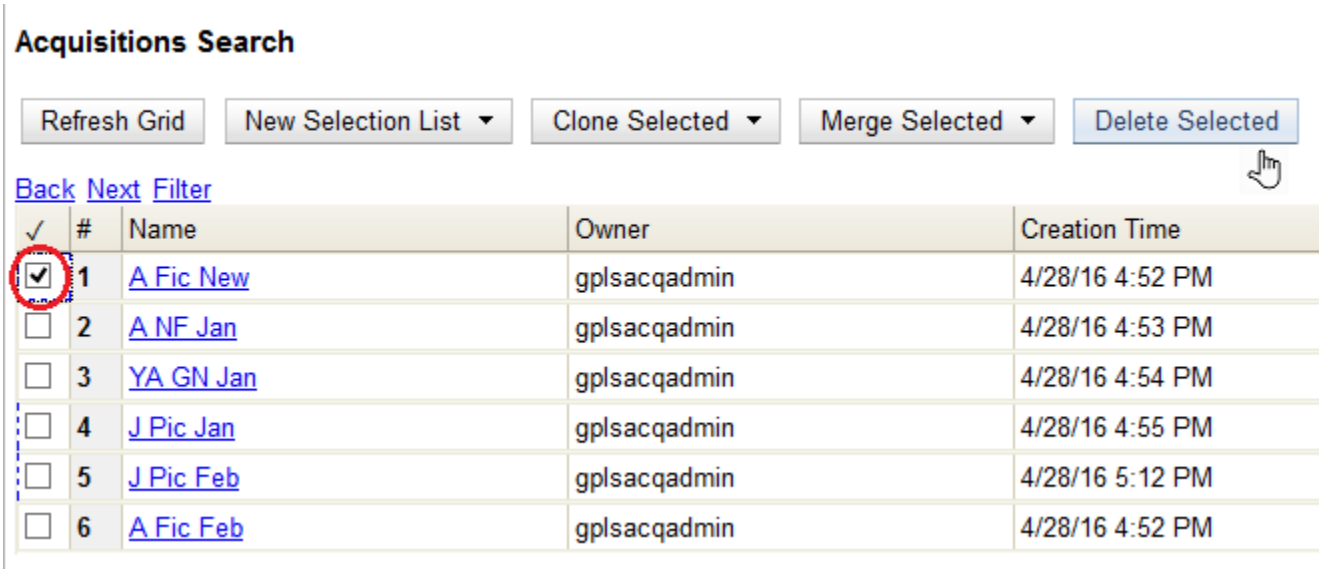
Delete a Selection List

Selection lists that are no longer needed can be deleted. Deleting a selection list deletes any line items not attached to a purchase order.

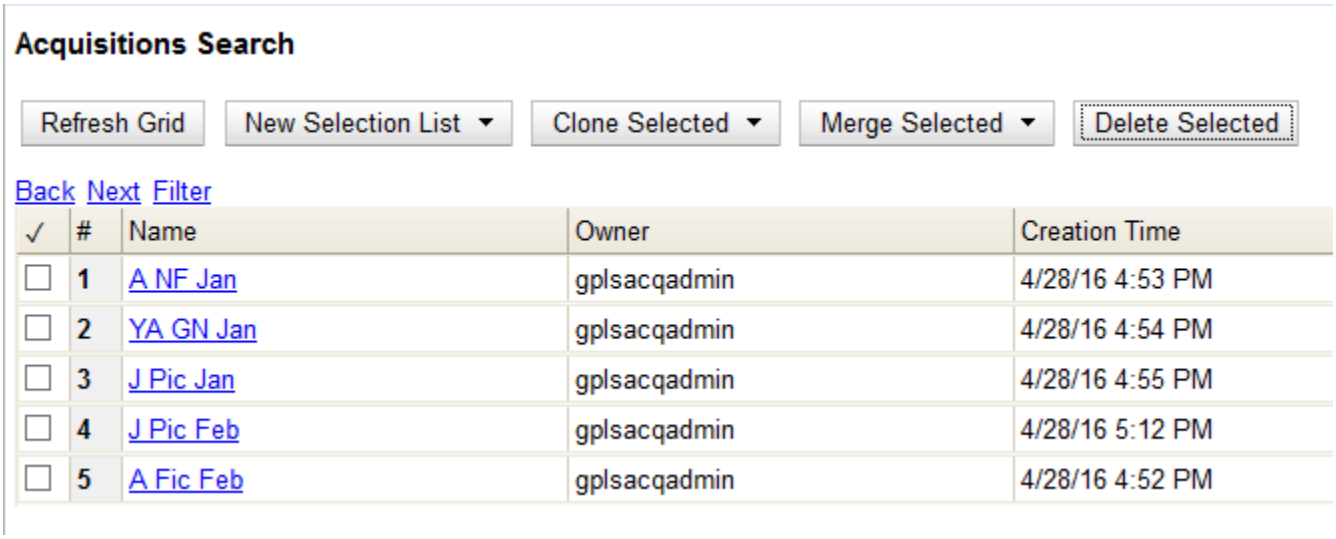
There is no message asking for confirmation that you wish to delete the selection list. Please ensure that you truly wish to delete your selection list before clicking *Delete Selected.* There is no undo!

1. Select *Acquisitions→My Selection Lists.*

2. Check the box(es) adjacent to the selection list(s) that you would like to delete and click *Delete Selected.*



3. Your selection list will be deleted.



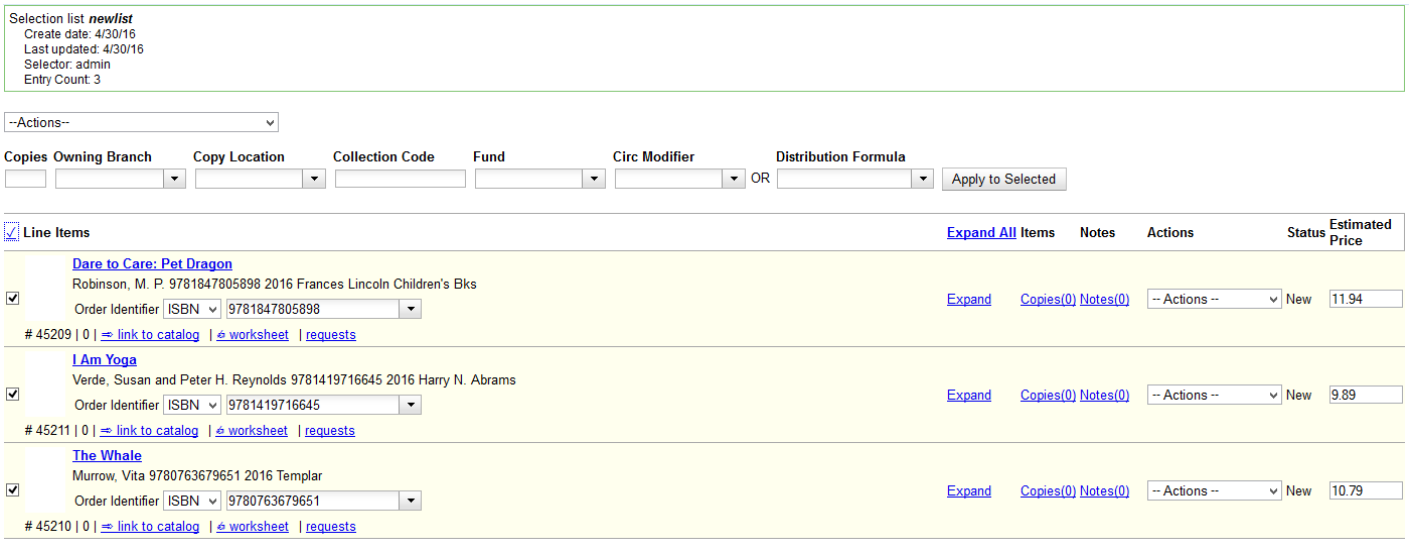
Mark Ready for Selector

This step is optional but may be useful to individual workflows.

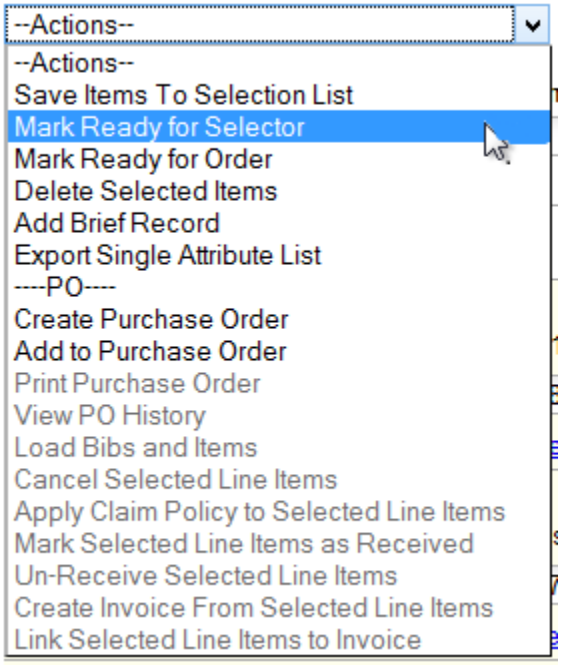
After an item has been added to a selection list or purchase order, it can be marked ready for the selector.

1. Open the selection list or purchase order that contains the line items you would like to *Mark Ready for Selector.*

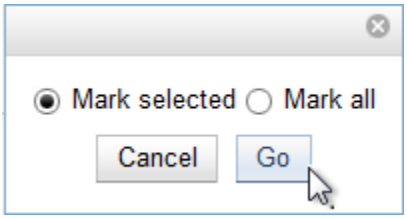
2. If you wish to *Mark Ready* only selected list items, check the boxes adjacent to those line items.



3. Select *Actions>Mark Ready for Selector.*



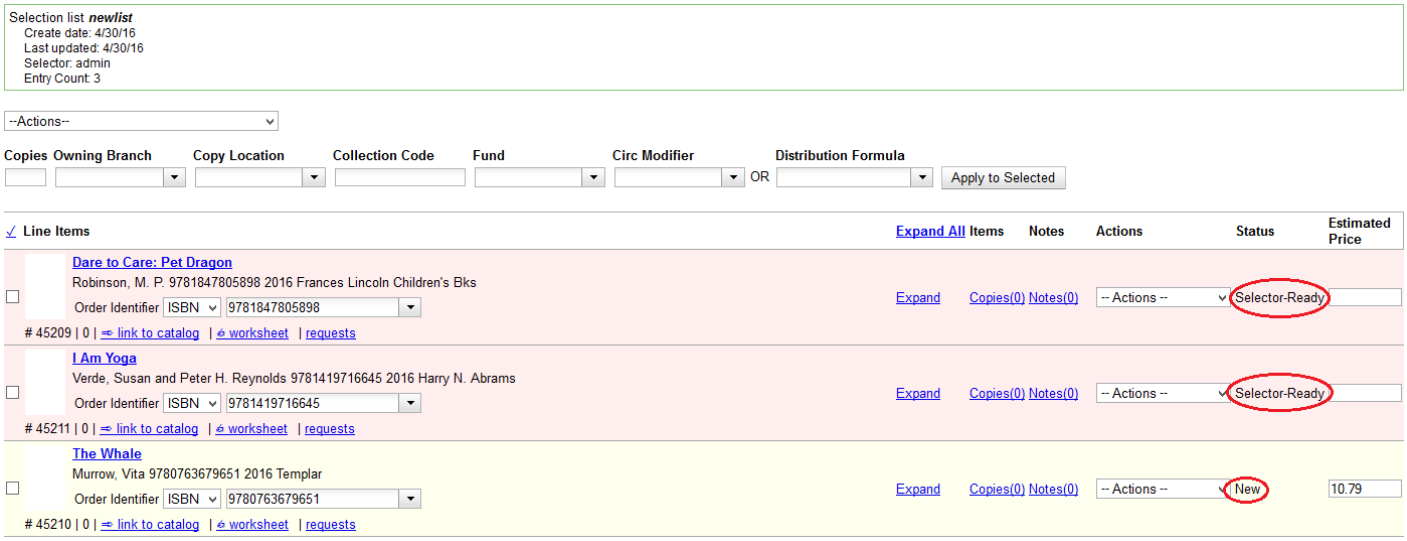
4. A pop-up box will appear. Choose to either *Mark selected* line items or *Mark all* line items.



5. Click *Go.*

6. The screen will refresh. The marked line item(s) will be highlighted light pink and the status will have

changed to *selector-ready.*



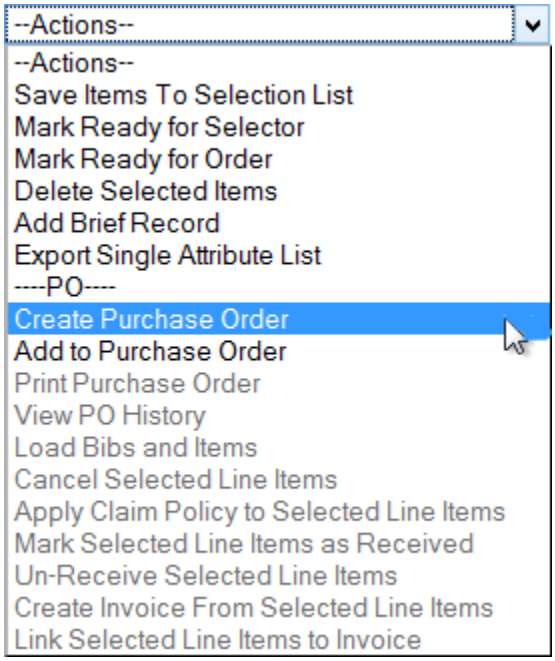
Convert a Selection List to a Purchase Order

When a selection list is finished, it can be converted to a purchase order through the *Actions menu*.

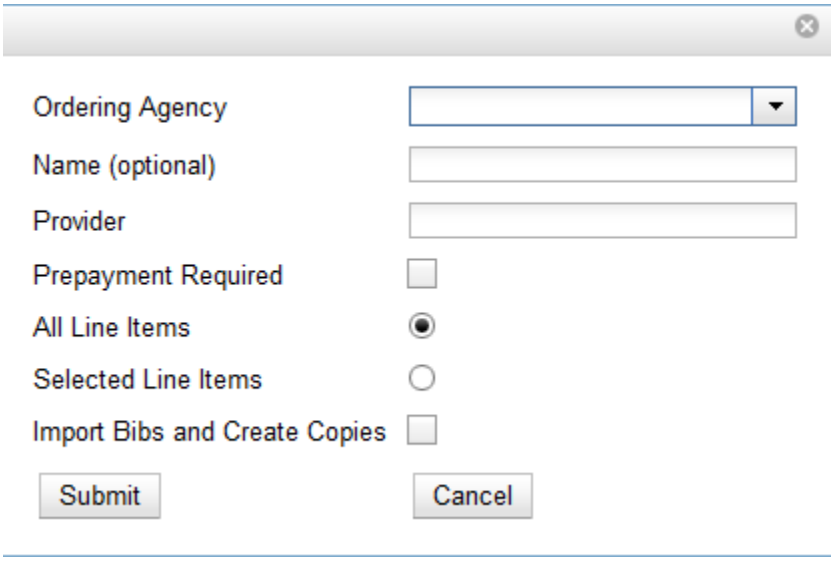
It is possible to convert particular line items on a selection list into a purchase order, rather than converting the entire selection list.

1. Open the selection list that you would like to convert to a purchase order.

2. Select *Actions→Create Purchase Order.*



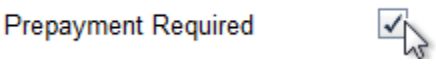
3. A pop-up box will appear.



4. Select the *Ordering Agency* from the drop down menu.

5. Enter the code for the Provider. This field will auto-complete as you type.

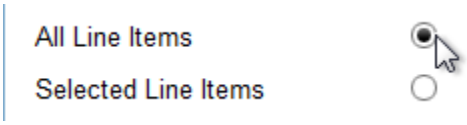
6. If prepayment is required, check the box adjacent to *Prepayment required.*



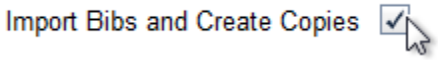
If prepayment is always required for a specific provider, your acquisitions administrator can set this in the provider's profile so it is automatically selected when you enter the

provider code.

7. Choose to either add *All Line Items* or *Selected Line Items* to the purchase order.

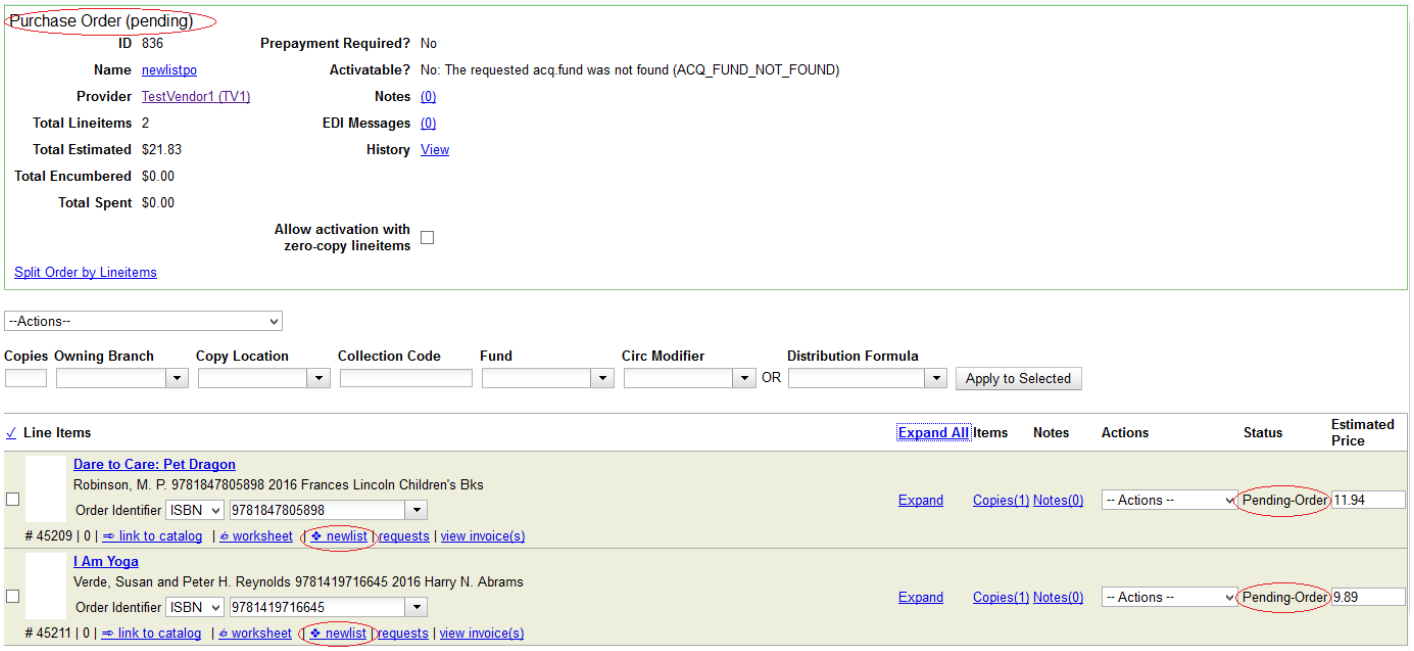


8. Check the box adjacent to *Import Bibs and Create Copies* if you wish to import them at this time. If you don't choose this, bibliographic items will be imported and copies created when the purchase order is activated, instead.



9. Click *Submit.*

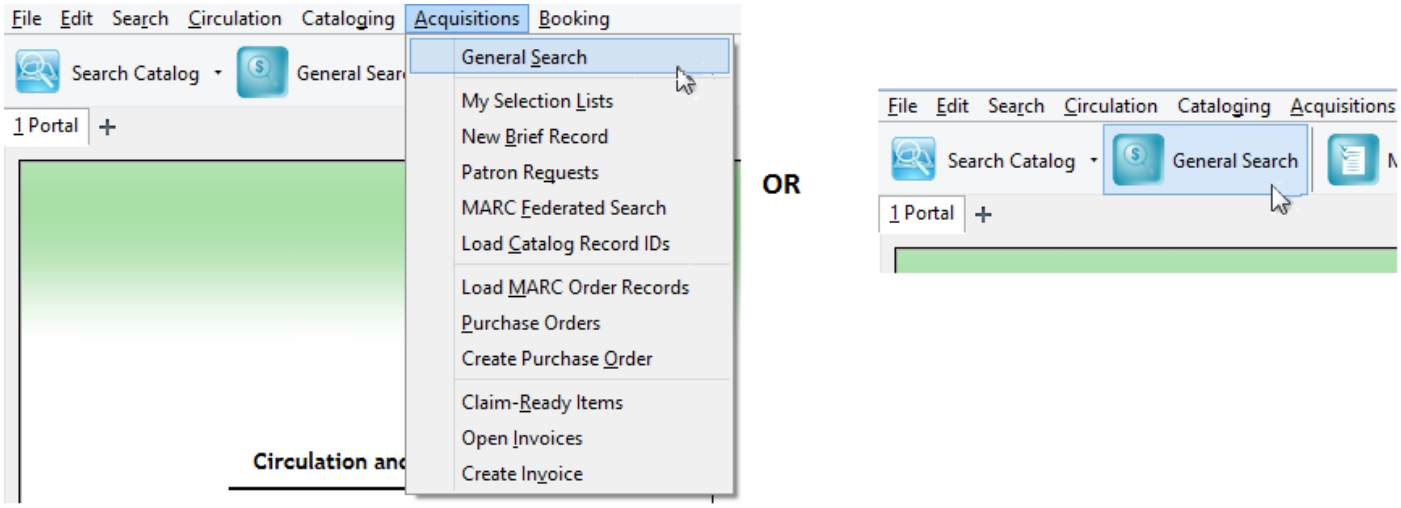
10. If *Import Bibs and Create Copies* box was checked, the import interface will open. See Vandelay interface for more information. Otherwise your purchase order will be created and open in the same tab.



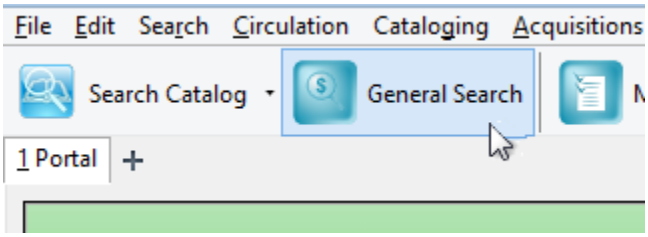
Search for a Selection List

My Selection Lists only displays the selection lists created by the user currently logged onto the workstation. You can view selection lists created by other users using the General Search.

1. To access the searching interface, select *Acquisitions→General Search*.



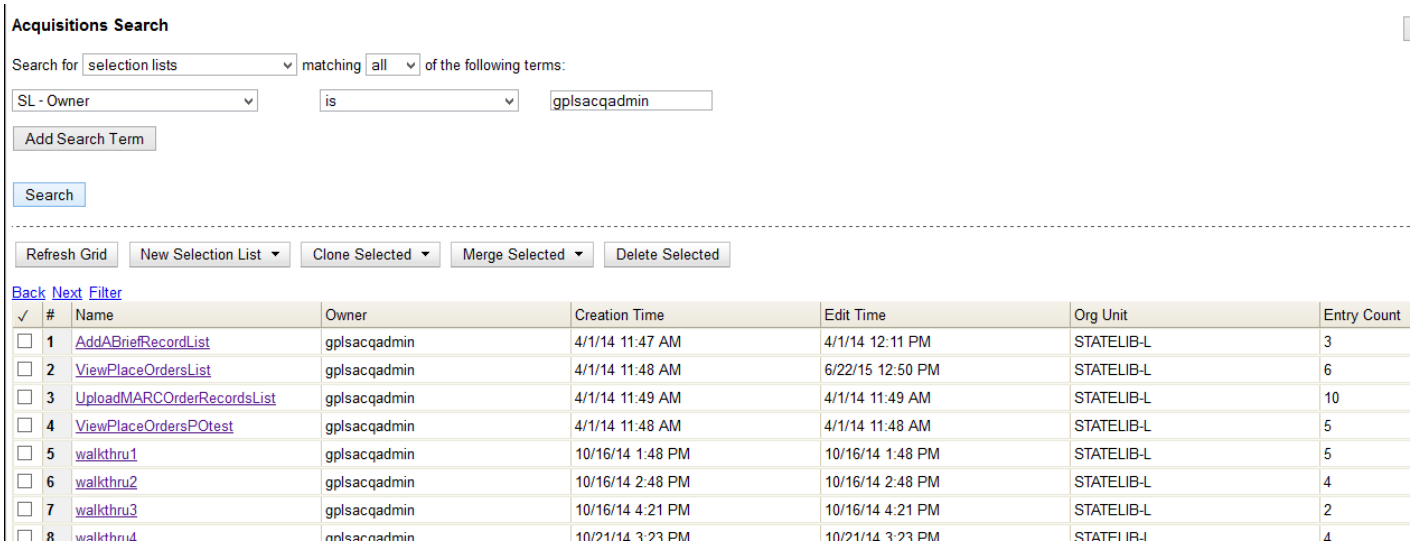
2. Choose *selection lists* from the *Search* for drop down menu.



3. Select your search field(s) and enter your search term(s).

4. Click Search or press the Enter key.

5. The selection lists meeting your search criteria will display in a grid.



✓	#	Name	Owner	Creation Time	Edit Time	Org Unit	Entry Count
☐	1	AddABriefRecordList	gplsacqadmin	4/1/14 11:47 AM	4/1/14 12:11 PM	STATELIB-L	3
☐	2	ViewPlaceOrdersList	gplsacqadmin	4/1/14 11:48 AM	6/22/15 12:50 PM	STATELIB-L	6
☐	3	UploadMARCOrderRecordsList	gplsacqadmin	4/1/14 11:49 AM	4/1/14 11:49 AM	STATELIB-L	10
☐	4	ViewPlaceOrdersPOtest	gplsacqadmin	4/1/14 11:48 AM	4/1/14 11:48 AM	STATELIB-L	5
☐	5	walkthru1	gplsacqadmin	10/16/14 1:48 PM	10/16/14 1:48 PM	STATELIB-L	5
☐	6	walkthru2	gplsacqadmin	10/16/14 2:48 PM	10/16/14 2:48 PM	STATELIB-L	4
☐	7	walkthru3	gplsacqadmin	10/16/14 4:21 PM	10/16/14 4:21 PM	STATELIB-L	2
☐	8	walkthru4	gplsacqadmin	10/21/14 3:23 PM	10/21/14 3:23 PM	STATELIB-L	4

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