



SirsiDynix Symphony 3.2

MARC Order Loader Training Guide

DOC-MOLTGEN-S

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MARC Ordering

Overview

Library staff place orders directly with a vendor. After the orders are placed, the vendor produces a file of MARC bibliographic records where each record contains information about an order for the title described in the bib record. The order information is in local use (9XX) tags in the bibliographic record.

MARC Ordering Process

The MARC ordering is a three-step process in SirsiDynix Symphony 3.2.

- Using the MARC Order Input wizard, located on the Utility toolbar, copy the file of bibliographic records from a client workstation to the appropriate directory on the server where SirsiDynix Symphony 3.2 resides. This wizard is also used to manage the files used in the process of loading 9XX orders.
- Using the Load Bibs with Order Info report, located on the Acquisition Load tab in the Reports module, load a file of bibliographic records with 9XX order information into the bibliographic database. This report also creates a flat file of order records based on the 9XX order information in the bibliographic records and places the file on the SirsiDynix Symphony 3.2 server.
- Using the Load Flat Order records report, located on the Acquisition Load tab in the Reports module, load the file of order records into the order database. These Order records are linked to their corresponding titles.

Once you load the bibliographic and order records to the SirsiDynix Symphony 3.2 database, library staff can receive, process, and invoice materials as they arrive using the Acquisitions wizards in WorkFlows.

Considerations and Planning

The most efficient ordering in 9XX is for basic monographic materials, such as firm and approval orders. You can order Books, AV material, and other materials if the order is of the Basic Order Type. You cannot use 9xx to create Dated or Recurring Orders. Any order that is the Basic order type can be specified when the bibliographic record is loaded.

The vendor must be able to produce a file of bibliographic records where each record contains information about an order for the title described in the bibliographic record. The bibliographic records must be in MARC communications format.

In SirsiDynix's MARC order loader, the library staff can specify the MARC tag and subfield where each order data element is located in the MARC record. While specific MARC tag numbers and subfield codes are not required, there are some conventions for the content and formatting of order data that must be followed for the successful loading of order records in SirsiDynix Symphony 3.2.

- SirsiDynix reserves the 999 field for a special use in the MARC record loading process, so order information cannot be housed in the 999 field.
- Fund ID and Holding Code, and quantity must appear in the same MARC tag.
 - SirsiDynix Symphony 3.2 uses Fund IDs in order records to specify which fund or funds to encumber when creating an order. Fund IDs are alphanumeric fields with a maximum length of 20 characters. Fund ID is a required field; records without a fund ID will fail to load. Order records containing fund IDs that SirsiDynix Symphony 3.2 cannot validate against the database of funds will not load.
 - SirsiDynix Symphony 3.2 uses Holding Codes to define the library, the item type and the location within the library where the material will be distributed after processing. Holding Codes are alphanumeric fields with a maximum length of 10 characters. The holding code is a required field; records without a holding code will fail to load. Order records containing holding codes that can't be validated against the controlled vocabulary established in SirsiDynix Symphony 3.2 by the library staff will not load.
 - You can specify funded quantity. If used, it must appear in the same MARC tag as the fund ID and holding code. If funded quantity is not specified,

SirsiDynix Symphony 3.2 assumes that it is "1."

“Funded Quantity” applies to both the fund ID and the holding code.

- Each of the three data elements—fund ID, holding code and funded quantity—must appear in separate and unique subfields. The order of the subfields is not important.
- The combination of these elements, fund ID, holding code, and optional funded quantity is referred to as "segments information."
- The tag designated for segments information can be repeated to allow for ordering multiple copies from varying funds and/or for different holding codes.

Examples of 9XX Entries

Aside from the 999 entry, any 9XX entry can contain order information. Order information can appear in any subfield as long as the subfield is not repeated and is unique to each component of order data.

The 9XX entry must contain both a fund ID and holding code. The 9XX entry can also contain quantity and price. If quantity and price are not indicated, the software will assume the quantity is 1 and the price is \$0.00.

The tag containing fund ID and holding code information can be repeated. The choice of MARC tag numbers and subfield codes in these examples is arbitrary (excluding the 999). The order of subfields is not important.

- This statement represents one copy funded from fund WVR and distributed to holding code MSTKS.
947 | aWVR | hMSTKS
- This statement represents two copies funded from fund WVR and distributed to holding code MSTKS.
947 | aWVR | b2 | hMSTKS
- These statements represent five copies funded from fund AFALIT. 3 copies distributed to holding code MSTKS and 2 copies distributed to holding code RSTKS.
947 | aAFALIT | b3 | hMSTKS
947 | aAFALIT | b2 | hRSTKS
- These statements represent five copies funded from fund AFALIT and distributed to holding code MSTKS; 5 copies funded from fund WVR and distributed to holding code MSTKS.

947 | aAFALIT | b5 | hMSTKS
 947 | aWVR | b5 | hMSTKS

MARC Order Import Wizard



The Marc Order Import Utility wizard, located on the Utility toolbar, imports and manages vendors' MARC records and the order records created from them. This wizard imports files of bibliographic records from the workstation to the */Unicorn/Marcordimp/Bibs* directory on the SirsiDynix Symphony 3.2 server. Once the bibliographic record files are imported to this server directory, the wizard can list, view, or remove the files. The bibliographic records can then be added to the SirsiDynix Symphony 3.2 database with the Load Bibs with Order Info (Biborderload) report.

To import a file of bibliographic records with 9XX order information

1. On the **Utility** module toolbar, click the **Marc Order**



Import wizard on the Common Tasks toolbar and click **OK**.

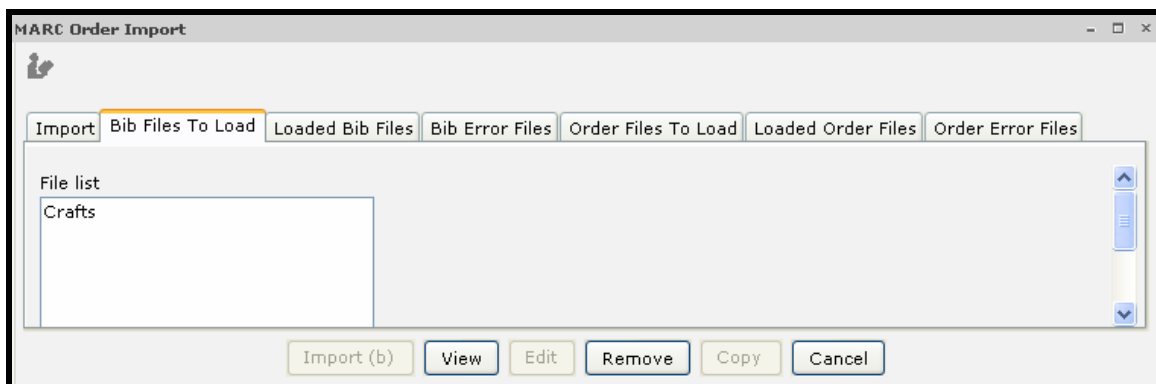
2. Specify the file name to use when importing records from the vendor. In the **Source** box, type the source file name as it exists on the workstation or server, or click the **Open File** gadget to select the source file. The gadget will display the entire file path name, including the drive.
3. In the **Destination** box, type the name you want to give the file when it is imported, and then click **Import**. The following confirmation window appears.



4. Click **Yes** to begin importing records. The Confirmation window displays the **Are there more files to upload?** prompt when the importation finishes.



5. Select one of the following options:
 - **Yes** – Displays the More Files window for you to select another records file to import. Type the file name in the Source box, or click the Open File gadget to browse for the file, and click **OK**. Any additional imported files will be appended to the original imported file.
 - **No** – This completes the import process and returns you to the Import tab. To view the processed records click on the Bib Files to Load tab. Select file and click on View. When finished click on Cancel and exit the wizard.



Load Bibs with Order Info Report

The Load Bibs with Order Info (Biborderload) report in the Acquisition Load report group matches and loads bibliographic data into the catalog, creates a file of flat ASCII order records, and tests the order records to verify that they can be loaded correctly into SirsiDynix Symphony 3.2. Order loading errors can be corrected using the **MARC Import Order Utility** wizard. The order files created by the report are placed in the */Unicorn/Marcordimp/Orders* directory on the SirsiDynix Symphony 3.2 server. Once the order record files are placed in this server directory, the **MARC Order Import Utility** wizard can list, view, modify, or remove the files.


Once any order loading errors are resolved, the Load Flat Order Records (Orderload) report in the Acquisition Load report group loads the order record into SirsiDynix Symphony 3.2. The order records can then be managed like any other order entered at the workstation by using the Acquisitions wizards and commands.

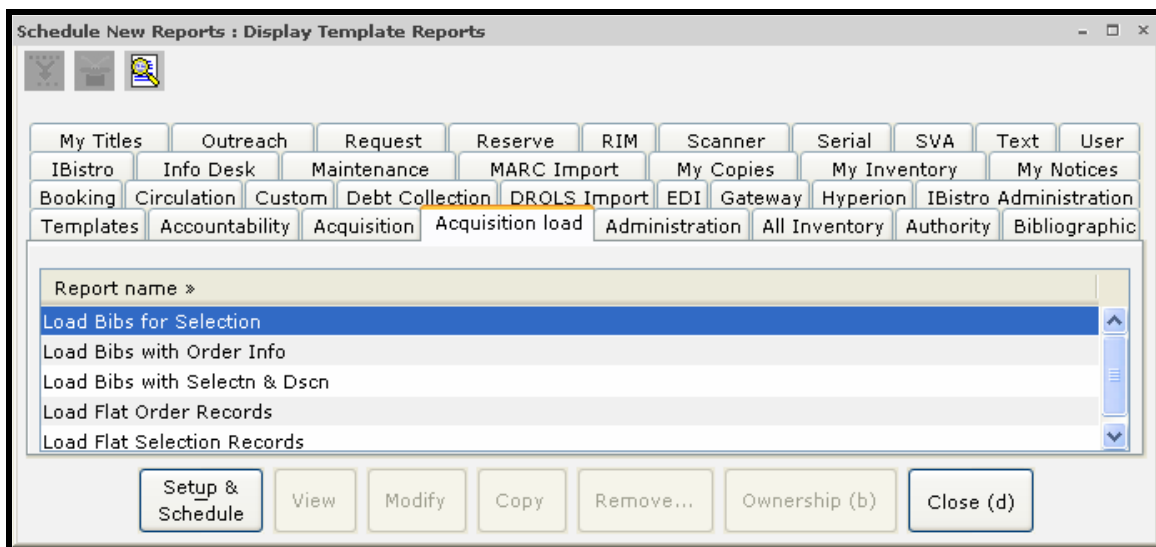
Bibliographic records can be searched as soon as they are successfully loaded. Individual orderlines can be added to existing bibliographic records, orderlines can be added to an existing order if specified in the incoming record, or new bibliographic records and orders may be created.

After the report runs, the report log indicates the files that were created for the bibliographic and order loads and tests the order records, reporting those that will not load correctly as well as those that will load. The load performed by the Load Bibs with Order Info report is a test load. The “Loaded Orders” in the report result are not actually loaded until the Load Flat Order Records is run with the Test Only option set to No.

If there is an error in a record that would prevent the order from loading, the error record prints below the error message in the report log to easily identify the data causing the problem. Error records are saved to *Marcordimp/Bibs/Error*. These records can be copied back into the *Marcordimp/Bibs* using Marc Order Import Utility, and then reloaded into SirsiDynix Symphony 3.2.

To load the bibliographic records with order information

1. On the **Reports** module toolbar, click the **Schedule New Reports** wizard  on the Common Tasks toolbar.
2. If the **Set Session Settings** window displays, click **OK** or press ENTER to accept the defaults. The Display Template Reports window opens.
3. Click the **Acquisition Load** tab.



Note: The Selection List Load reports are covered in Selection List training.

4. Select the **Load Bibs with Order Info** report, and then click **Setup & Schedule**. The Load Bibs with Order Info window appears.

5. Click the **Load** tab. The following window appears:

The screenshot shows a dialog box titled "Schedule New Reports : Schedule Load Bibs with Order Info". It has four tabs: "Basic", "Load", "Order Options", and "Print Options". The "Load" tab is active. The dialog is divided into four sections:

- Input File:** A dropdown menu labeled "File to load:".
- Title Control Processing:** A dropdown menu for "Title control number source for incoming items:", a checkbox for "Compare multiple occurrences of a title control number field (not recommended)", a dropdown menu for "Default record format:", and a dropdown menu for "Update title control information from title information entry:".
- Bibliographic Record Processing:** A checkbox for "Remove medical subject headings (MeSH)".
- Call Number And Copy Processing:** A checkbox for "Copy processing: Create copies", a dropdown menu for "Class scheme:" (set to "AUTO"), and a dropdown menu for "Default holding code:" (set to "DEFAULT").

At the bottom of the dialog are four buttons: "Schedule", "Run Now", "Save As Template", and "Cancel".

6. In the **File to load** list, select your file.
7. Complete the remaining selection criteria accordingly. When the Load Bibs with Order Info report is run, these values are required.
 - File to load
 - Title Control Number Source for Incoming Items
 - Default Record Format
 - Class Scheme
 - Default Holding Code

8. Click the **Order Options** tab. The following window appears:

The screenshot shows a software window titled "Schedule New Reports : Schedule Load Bibs with Order Info". The window has four tabs: "Basic", "Load", "Order Options" (which is selected and highlighted), and "Print Options".

Under the "Order Options" tab, the following fields and options are visible:

- Maintenance library: (dropdown)
- Order ID: Auto-generated order ID, one orderline per bib record
 Auto-generated order ID, one order per bib record
 Order ID read from bib record
- MARC tag number: Subfield:
- Vendor ID: (lookup icon)
- Order type: (dropdown)
- Fiscal cycle: (dropdown)
- Unit price tag number: Subfield:
- Currency: (dropdown)
- Requisition number:

Below these fields is a section titled "Additional orderline information" with a light blue border:


- MARC tag number: Subfield:
- Entry ID: (dropdown)

At the bottom of the main form area is the "Segments information:" field with a lookup icon and a checked checkbox: Set date mailed, date to claim, date to cancel.

At the bottom of the window are four buttons: "Schedule", "Run Now", "Save As Template", and "Cancel".

9. Complete the remaining selection criteria accordingly. When the Load Bibs with Order Info report is run, these values are required.
 - Maintenance Library
 - Fiscal Cycle
 - Vendor ID
 - Order Type
 - Segments Information
10. Verify the Print Options.
11. Click **Run Now** to run the report immediately or Click **Schedule** to run the report at a later time.

To view order information loaded

1. On the **Reports** module toolbar, click the **Finished Reports** wizard  on the Common Tasks toolbar.
2. From the list of finished reports choose the Load Bibliographic Records with Order Info report you just ran and click on **View**. Click on **OK** on the Report to View: Load Bibs with Order Info screen.
3. Scroll down the finished report log to view the order information.

```
UNICORN extract MARC orders finished on Monday, August 21, 2006, 6:06 PM
*****
*****
Flat order records have been written to
d:/Sirsi/Unicorn/Marcordimp/Orders/2006082100012o
*****
*****
```

4. Make note of the file name. You will load that file in the next section.

Load Flat Order Records Report

The Load Flat Order Records report loads the flat ASCII order records created by the Load Bibs with Order Info. Follow these steps to complete the 9XX ordering process.

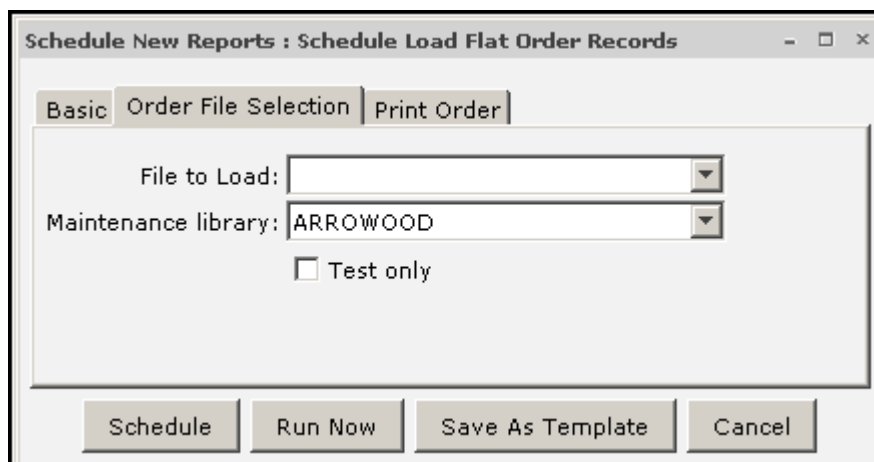
To load a file of order records

1. On the **Reports** module toolbar, click the **Schedule New**



Reports wizard on the Common Tasks toolbar.

2. If the **Properties** window displays, click **OK** or press ENTER to accept the defaults. The Display Template Reports window opens.
3. Click the **Acquisition Load** tab.
4. Select the **Load Flat Order Records** report, and then click **Setup & Schedule**.
5. Click the **Order File Selection** tab. The following window appears:



6. In the **File to Load** list, select your file, (2006082100010o, for example)
7. In the **Maintenance library** list, select a maintenance library.
8. Decide whether or not you want to run the report in test mode.

9. Select the **Print Order** tab and make necessary selections.
10. Click **Run Now** to run the report immediately or Click **Schedule** to run the report at a later time.

To view loaded orders

1. After the report has been scheduled, click on **Display Finished Reports** button, or the **Finished Reports** wizard on the **Reports** module toolbar.
2. From the list of finished reports choose the Load Flat Orders report you just ran and click on **View**. Click on **OK** on the Report to View: Flat Orders screen.
3. Scroll down the finished report log to view the order information.

```

Load flat order records

Produced Wednesday, November 29, 2006 at 10:27 AM

Order ID:PO-56                fiscal cycle:2006
Vendor ID:BT                  order type:FIRM
amt ordered:                  $0.00          amt funded:          $24.95
amt invoiced:                 $0.00          amt paid:            $0.00
date created:11/29/2006      date modified:11/29/2006  date ready:11/29/2006
date to cancel:6/27/2007    date to claim:5/28/2007  date mailed:11/29/2006
copies paid:0                copies outstanding:1      copies received:0
copies ordered:1             copies cancelled:0        copies invoiced:0
1) requisition number:      copies:1
   unit price:                $24.95          native unit price:   $24.95
   extended price:            $24.95          native extended price: $24.95
amount encumbered:          $24.95          amount invoiced:     $0.00
   amount paid:                $0.00
   discount:0
   call number:XX(39320.1)
   ISBN/ISSN:0785375678
Title:100 years of baseball.
ISBN:0785375678
Publication info:Lincolnwood, IL : Publications International,
2002
    
```

Appendix A: Creating Selection Lists in Batch

Overview

For sites that have purchased the optional 9XX/MARC Order Loader module, the Acquisition Load group of reports allows libraries to use book vendor web sites to create selection lists. The book vendor provides a file of MARC bibliographic records that can be loaded into SirsiDynix Symphony 3.2. These bibliographic records may contain selection list information. The Acquisition Load reports for Selection Lists accomplish the following tasks.

- Matches and loads bibliographic records from the vendor into the catalog and creates flat selection records that may be used to create SirsiDynix Symphony 3.2 selection records.
- Loads flat selection list records (with or without decisions) into SirsiDynix Symphony 3.2; selection list records can then be converted to orders.


Note	These reports are covered in the Selection Lists training.
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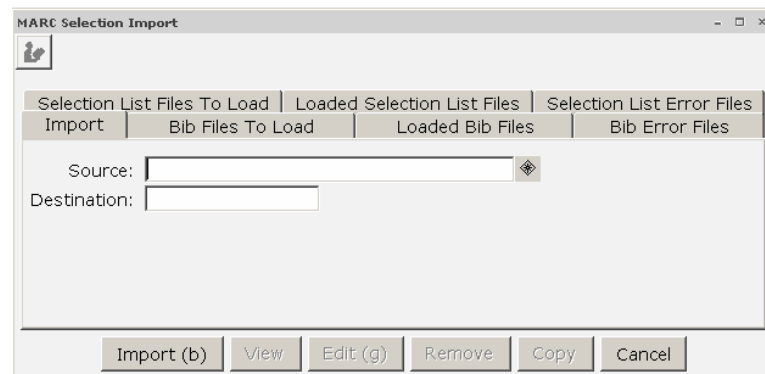
MARC Selection List Import Wizard

The MARC Selection List Import Utility wizard, located on the Utility toolbar, imports and manages vendors' MARC records and the selection list records created from them. This wizard imports files of bibliographic records from the workstation to the */Unicorn/Marcseimp/Bibs* directory on the SirsiDynix Symphony 3.2 server. Once the bibliographic record files are imported to this server directory, the wizard can list, view, or remove the files. The bibliographic records can then be added to the SirsiDynix Symphony 3.2 database with the Load Bibs for Selection report or the Load Bibs with Selections and Decisions report.

To import a file of bibliographic records with Selection List information

1. On the **Utility** module toolbar, click the **Marc Selection**

 **Import** wizard on the Common Tasks toolbar and click **OK**.



2. Specify the file name to use when importing records from the vendor. In the **Source** box, type the source file name as it exists on the workstation or server, or clicks the **Open File** gadget to select the source file. The gadget will display the entire file path name, including the drive.

3. In the **Destination** box, type the name you want to give the file when it is imported, and then click **Import**. The following confirmation window appears.



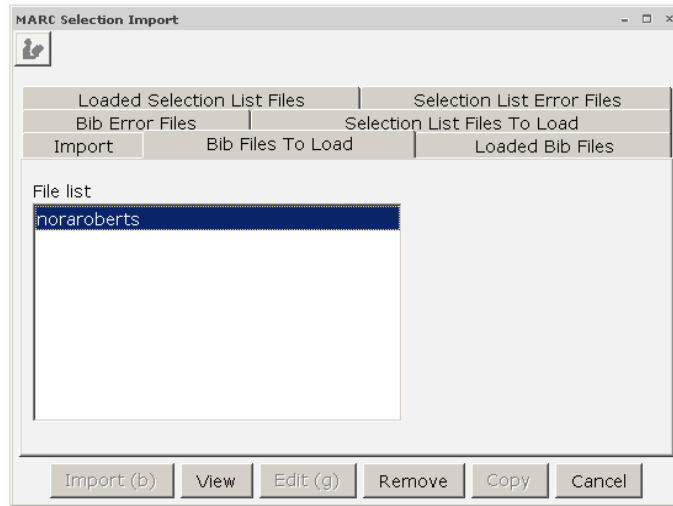
4. Click **Yes** to begin importing records. The Confirmation window displays the Are there more files to upload? prompt when the import finishes.



5. Select one of the following options:

Yes – Displays the More Files window for you to select another records file to import. Type the file name in the Source box, or click the Open File gadget to browse for the file, and click OK. Any additional imported files will be appended to the original imported file.

No – This completes the import process and returns you to the Import tab. To view the processed records click on the Bib Files to Load tab. Select file and click on View. When finished click on Cancel to exit the wizard.




Load Bibs for Selection Report

After the bibliographic records are imported to the server with the MARC Selection List Import wizard, one of two reports must be run. Which report will depend on whether or not selection information is embedded in the bibliographic records. If the bibliographic records do not contain any selection list information, the Load Bibs for Selection report will need to be run. If the bibliographic records contain selection list information, the Load Bibs with Selections and Decisions report will need to be run. Both reports will load bibliographic records into the catalog and create flat files of selections list records to be loaded by the Load Flat Selection Records report.

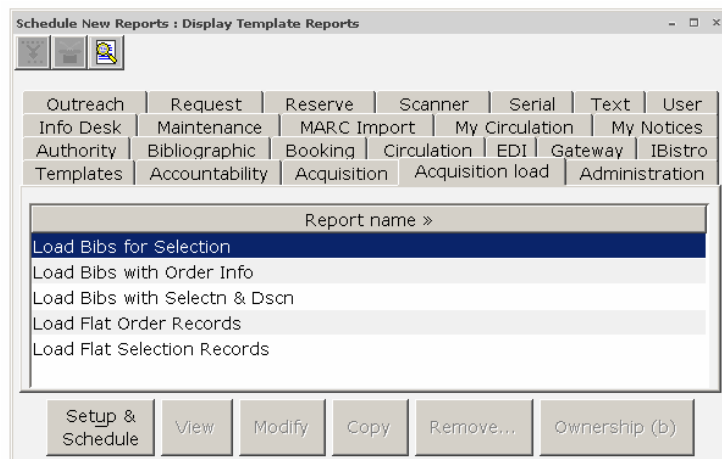
To load bibliographic records with the Load Bibs for Selection Report

1. On the **Reports** module toolbar, click the **Schedule New**

Reports  wizard on the Common Tasks toolbar and click **OK**.

2. If the **Properties** window displays, click **OK** or press ENTER to accept the defaults. The Display Template Reports window opens.

3. Click the **Acquisition load** tab.



4. Select the **Load Bibs for Selection** report, and then click **Setup & Schedule**. The Schedule Load Bibs for Selection window appears.
5. Click the **Load** tab.
6. In the **File to load** list, select your file.

The screenshot shows a dialog box titled "Schedule New Reports : Schedule Load Bibs for Selection". It has four tabs: "Basic", "Load", "Selectionlist Options", and "Print options". The "Load" tab is active. The "Input File" section has a "File to load:" dropdown menu with "noraroberts" selected. Below this is the "Title Control Processing" section, which includes a "Title control number source for incoming items:" dropdown, a checkbox for "Compare multiple occurrences of a title control number field (not recommended)", a checkbox for "Shadow loaded records", a "Default record format:" dropdown, and an "Update title control information from title information entry:" dropdown. The "Bibliographic Record Processing" section has a checkbox for "Remove medical subject headings (MeSH)". The "Call Number And Copy Processing" section has a "Copy processing:" checkbox for "Create copies", a "Class scheme:" dropdown set to "AUTO", and a "Default holding code:" dropdown set to "DEFAULT". At the bottom are buttons for "Schedule", "Run Now (b)", "Save As Template", and "Cancel".

7. Complete the remaining selection criteria accordingly. When the Load Bibs for Selection report is run, these values on the **Load** tab are required.
 - File to load
 - Title Control Number Source for Incoming Items
 - Default Record Format
 - Class Scheme
8. Click the **Selectionlist Options** tab.

Schedule New Reports : Schedule Load Bibs for Selection

Basic | Load | Selectionlist Options | Print options

Selection List

Maintenance library:

Selectionlist ID: Input selectionlist ID
 Auto-generated selectionlist ID

Selectionlist name:

List category 1:

List category 2:

List owner:

Selectionlist status:

Fiscal cycle:

Cutoff date: NEVER

List Line

Currency: US

Requisition number:

Unit price tag number:

MARC tag number: Subfield:

Additional list line information

MARC tag number: Subfield:

Entry ID:

Decision

Create decision No decision

Purchase decision:

Selector ID:

Order Map:

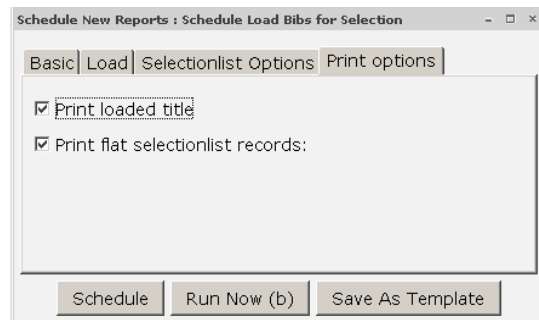
Holding code:

Schedule | Run Now (b) | Save As Template | Cancel

9. Complete the remaining selection criteria accordingly. When the Load Bibs for Selection report is run, these values on the **Selectionlist** tab are required.

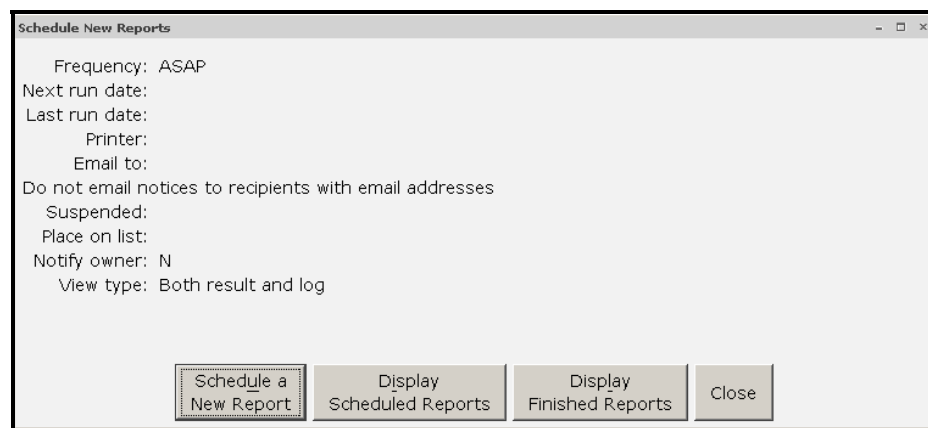
- Maintenance library
- Selectionlist ID
- List owner
- Selectionlist status
- Fiscal cycle

10. Click the **Print Options** tab and make necessary selections.



11. Schedule the report to run.

12. Click on the **Display Finished Reports** button.



13. From the list of finished reports choose the Load Bibs for Selection report you just ran and click on **View**. Click on **OK** on the Report to View: Load Bibs for Selection screen.
14. Scroll down the finished report log to view the following section:


```
*****  
*****  
*****  
*****  
Flat selection records have been written to  
/j/Multi/Unicorn//Marcelimp/Sellists/2006121800041s  
*****  
*****  
*****  
*****
```

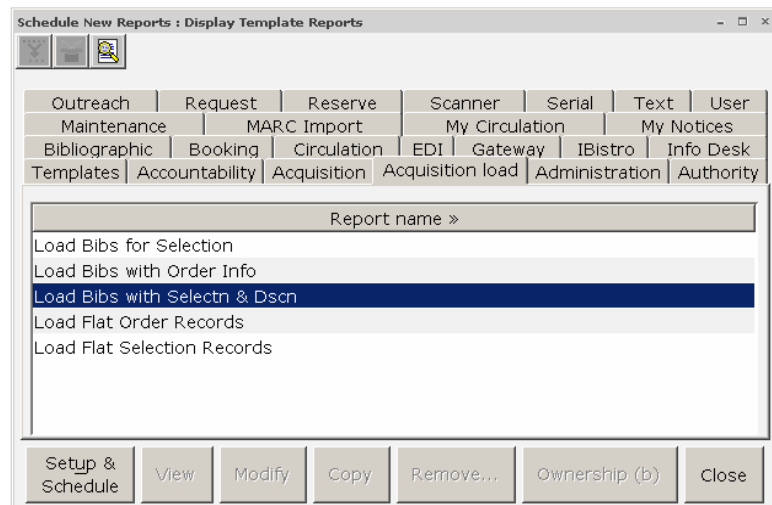
15. Make note of the file name. This file will be loaded with the Load Flat Selection Records report.

Load Bibs with Selections and Decisions Report

The Load Bibs with Selections and Decisions report can be run instead of the Load Bibs for Selections report if the selection list info is embedded in the bibliographic record. This report will load bibliographic records and create flat selection list records which will be added with the Load Flat Selection Records report.

To load bibliographic records with the Load Bibs for Selection Report

1. On the **Reports** module toolbar, click the **Schedule New Reports**  wizard on the Common Tasks toolbar and click **OK**.
2. If the **Properties** window displays, click **OK** or press ENTER to accept the defaults. The Display Template Reports window opens.
3. Click the **Acquisition load** tab.



4. Select the **Load Bibs with Selectn & Dscn** report, and then click **Setup & Schedule**. The Schedule Load Bibs with Selectn & Dscn window appears.
5. Click the **Load** tab.

6. In the **File to load** list, select your file.

Screenshot of the "Schedule New Reports : Schedule Load Bibs with Selectn & Dscn" dialog box. The "Load" tab is selected. The "Input File" section shows "File to load:" with a dropdown menu displaying "cardinals". The "Title Control Processing" section includes a "Title control number source for incoming items:" dropdown menu, checkboxes for "Compare multiple occurrences of a title control number field (not recommended)" and "Shadow loaded records", a "Default record format:" dropdown menu, and an "Update title control information from title information entry:" dropdown menu. The "Bibliographic Record Processing" section has a checkbox for "Remove medical subject headings (MeSH)". The "Call Number And Copy Processing" section includes a "Copy processing:" checkbox for "Create copies", a "Class scheme:" dropdown menu set to "AUTO", and a "Default holding code:" dropdown menu set to "DEFAULT". Buttons at the bottom include "Schedule", "Run Now (b)", "Save As Template", and "Cancel".

7. Complete the remaining selection criteria accordingly. When the Load Bibs with Selectn & Dscn report is run, these values on the **Load** tab are required.

- File to load
- Title Control Number Source for Incoming Items
- Default Record Format
- Class Scheme

8. Click the **Selectionlist Options** tab.

Screenshot of the "Schedule New Reports : Schedule Load Bibs with Selectn & Dscn" dialog box, showing the "Selectionlist Options" tab. The dialog contains the following fields and options:

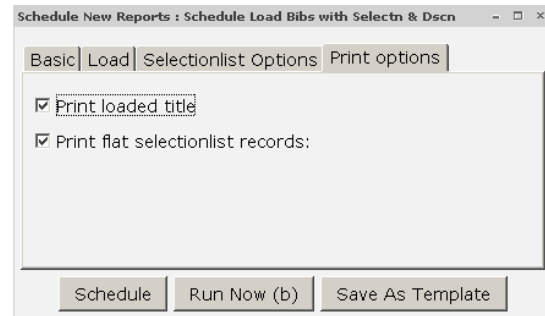
- Selection List:**
 - Maintenance library: [Dropdown]
 - Selectionlist ID: Input selectionlist ID [Text], Auto-generated selectionlist ID, Use selectionlist ID from bib record
 - MARC tag number: [Text] Subfield: [Text]
 - Selectionlist name: [Text]
 - List category 1: [Dropdown]
 - List category 2: [Dropdown]
 - List owner: [Text]
 - Selectionlist status: [Dropdown]
 - Fiscal cycle: [Dropdown]
 - Cutoff date: NEVER [Dropdown]
- List Line:**
 - Currency: US [Dropdown]
 - Requisition number: [Text]
 - Unit price tag number: [Text]
 - MARC tag number: [Text] Subfield: [Text]
- Additional list line information:**
 - MARC tag number: [Text] Subfield: [Text]
 - Entry ID: [Dropdown]
- Decision:**
 - Purchase decision: [Dropdown]
 - Selector ID: [Text]
 - Segments information: [Text]

Buttons at the bottom: Schedule, Run Now (b), Save As Template, Cancel

9. Complete the remaining selection criteria accordingly. When the Load Bibs for Selection report is run, these values on the **Selectionlist** tab are required.

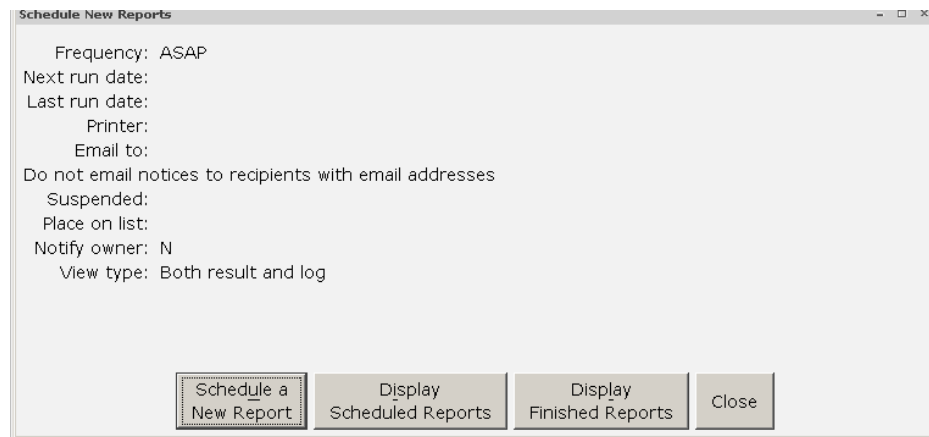
- Maintenance library
- Selectionlist ID
- List owner
- Selectionlist status
- Fiscal cycle
- Purchase decision
- Selector ID
- Segment information

10. Click the **Print Options** tab and make necessary selections.



11. Schedule the report to run.

12. Click on the **Display Finished Reports** button.



13. From the list of finished reports choose the Load Bibs with Selectn & Dscn report you just ran and click on **View**. Click on **OK** on the Report to View: Load Bibs for Selection screen.

14. Scroll down the finished report log to view the following section:


```
UNICORN item printing finished on Wednesday, January 3, 2007, 5:52 PM
Flat selection records have been written to d:/Sirsi/Unicorn//Marcselimp/Sellist
s/2007010300013s
```

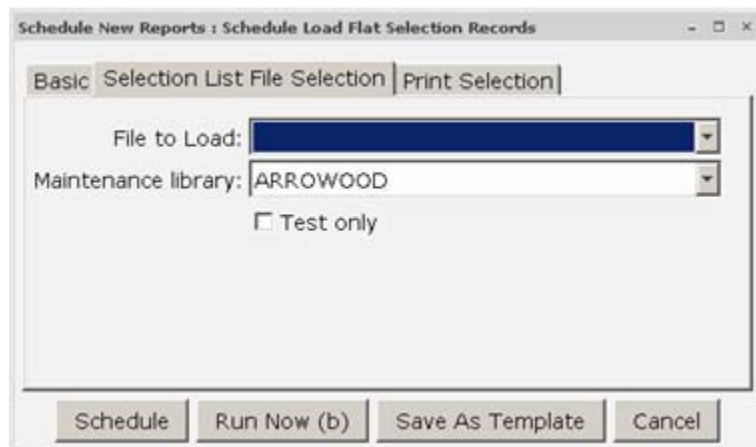
15. Make note of the file name. This file will be loaded with the Load Flat Selection Records report.

Load Flat Selection Lists Report

The Load Flat Selection Records report loads the flat ASCII selection list records created by the Load Bibs with Selections and Decisions or the Load Bibs for Selection reports. Follow these steps to complete the selection list load process.

To load a file of flat selection lists

1. On the **Reports** module toolbar, click the **Schedule New Reports** wizard  on the Common Tasks toolbar.
2. If the **Properties** window displays, click **OK** or press ENTER to accept the defaults. The Display Template Reports window opens.
3. Click the **Acquisition Load** tab.
4. Select the **Load Flat Selection Records** report, and then click **Setup & Schedule**.
5. Click the **Selection List File Selection** tab. The following window appears:



6. In the **File to Load** list, select your file, (2006082100010o, for example)
7. In the **Maintenance library** list, select a maintenance library.
8. Decide whether or not you want to run the report in test mode.

9. Select the **Print Selection** tab and make necessary selections.

Schedule New Reports : Schedule Load Flat Selection Records

Basic Selection List File Selection **Print Selection**

Selection List Information

Description Category Status Alert

Create/modify Summary Extended

Listline Information

Bibliographic Parts/Binding Vendor ID Summary

Price Additional price Miscellaneous Create/modify

Order Extended

Decision Information

Description Create/modify Extended

Segments Information

Selectiondist Selectionfunding

Subtotals

Summary

Selection list record per page

Schedule Run Now (b) Save As Template Cancel

11. Click **Run Now** to run the report immediately or Click **Schedule** to run the report at a later time.

To view loaded selection lists

1. After the report has been scheduled, click on **Display Finished Reports** button, or the **Finished Reports** wizard on the **Reports** module toolbar.
2. From the list of finished reports choose the Load Flat Selection report you just ran and click on **View**. Click on **OK** on the Report to View: Flat Selection Lists screen.
3. Scroll down the finished report log to view the loaded selection lists information.

```
Load flat selection list records

Produced Wednesday, January 3, 2007 at 5:59 PM

Selectiondist--
    holding code:ANONFICNEW                Quantity:1
Selectionfunding--
    fund ID:FUND                            Quantity:1

1)          call number:XX(39343.1)
            ISBN/ISSN:1596702389
    Personal Author:Borowsky, Larry
    Title:Diehard Cards : St. Louis Cardinals 2006 World
            Series Champions
    ISBN:1596702389

Number of decisions:1                    Quantity:1
    unit price:$0.00                      Amount:$0.00

Selector ID:717
Selector name:Millikan, Jennifer
Decision:BUY                            Quantity:1

Selectiondist--
    holding code:ANONFICNEW                Quantity:1
Selectionfunding--
    fund ID:FUND                            Quantity:1

2)          call number:XX(39344.1)
            ISBN/ISSN:1572439948
    Corporate Author:Triumph Books
    Title:Cardinals rule : St. Louis Cardinal's incredible
            2006 championship season
    ISBN:1572439948
```