

Glossary

Please note this Glossary is a list of terms commonly used throughout OASIS and not intended to capture procedures. For procedural information relating to a particular term please refer to the A-Z list.

Access License (Licence) –provides users the right to access services. Usage is generally determined by the number of access credits purchased and there are no turn-away due to concurrent usage. Access credits automatically refresh annually.

- For MyLibrary this model is compatible with offline downloads, perpetuity and PDA options.

Action Arrow - Enables title-by-title actions such as ‘Select’ or ‘Order.’ There is a column visible in most title lists with a green "Action" arrow where a user can hover over the arrow to see the list of actions that may be taken on a title.

Administration – OASIS facility to manage library-wide settings and personal user account settings, including user access levels, Marc records, method of ordering, bibliographic display, etc

Administrator – There is one administrator for each account with responsibility for *Administration*.

Advanced Search – Allows user to narrow or broaden their search through specific attributes they want to use as parameters for the subject/topic selected. The Advanced Search form also allows the user to save specific searches for future use.

All Customer Demand - In the OASIS browse rows, enables users to see totaled actions taken on a title, country by country. Hover over "All Customer Demand" to view information such as overall number of copies sold.

Approval Claim – “see” Claim.

Approval Plan – An arrangement whereby pertinent books are automatically provided to a library, based upon a mutually agreed upon ‘profile.’ This is better known in the UK as ‘Supplier Selection.’ Approval books may be returned by the library, unless we also provide physical processing. Profiles normally generate ‘Slips’ for pertinent titles also, again under profile specifications.

Authorize Orders – Process by which a *Ratifier*, designated thus in *Administration* can handle the placement of orders either directly through OASIS or via EDI orders from the local system.

BIC codes – Book Industry Communications standard subject codes as used by publishers and booksellers.

Binding Format – Refers to the particular physical presentation or medium of a title.

Block – An instruction from a user with ‘Approval Block’ authority for OASIS not to treat a given title on Approval on the library’s behalf (as with gift books.)

BookStream – Historical name for used for OASIS approval plan service. Better known as Supplier Selection in the UK. These terms are not currently used but may be found in older workflows.

Browse Row – The listing for each title as seen in the upper part of a split screen in search results, Slip Notifications, Lists, etc. In the single-screen view of titles, this becomes the only immediately visible bibliographic display.

CCB – “see” Current Canadian Books.

Catalogue Check - OASIS supports using a Catalogue Check URL to perform lookups against a specified local catalogue or other resource by doing an ISBN substitution for the \$ISBN placeholder. The Title and Author fields can also be searched in openURL-compliant catalogues.

Checklist – Monthly list of titles due on standing order.

Check Status – Warning messages in red letters of possible duplications, and gold-lettered messages for other library actions (such as Lists) displayed in a browse screen, as well as in the bottom tab. They are there to let you know what actions have been taken against the titles. A full list of Check Status phrases is available here.

Claim – Has several OASIS meanings. **1)** Under certain conditions, users may ‘claim’ a firm order or standing order, that is, send OASIS a query on the status of that order; **2)** a ‘Claim on Approval’ is a user action instructing OASIS to ship a title on the library’s Approval Plan, bypassing profile specifications; OASIS ‘claims’ to publishers for our own orders on behalf of customers are visible in Order History.

Claim on Approval – “see” Claim.

OASIS Communities – “see” Community Groups.

Community Groups – ‘OASIS Communities’ is the name of an opt-in service enabling OASIS users to create networks of libraries in order to view actions taken on titles by those libraries. Those networks are referred to as ‘Community Groups.’

Current Canadian Books (CCB) – A comprehensive listing of new Canadian books and books of Canadian interest treated on Approval Plans by OASIS, posted monthly in OASIS.

DDA – “see” Demand Driven Acquisitions.

Delete – A Green Action Arrow action (above) available in varying contexts throughout OASIS enabling users to remove titles from Lists. Differs from *Reject* or *Recycle* in that no record of the Delete action is kept or displayed.

Demand Driven Acquisitions (DDA) – Mediated/or unmediated ordering of electronic books by loading records into a library catalog with a button that initiates the formal purchase based on patron demand. EBL has the longest running mediated DDA program with the most flexible options. Every title in the EBL catalog is available through DDA.

Detailed Search – Facility within **Order Status** to search for information on orders in a more filtered way. See also *Lookup Search* .

Digital Reprint Publisher – A publisher whose sole business is the large-scale digitization of out-of-copyright books. OASIS users have the option of suppressing these titles from search results.

Downloadable eBooks – Titles that a publisher is willing to permit to be transferred by users with certain restrictions to a PC, lap-top or portable device for offline viewing.

EBL - content for EBL (Ebook Library) platform for e-books is available through OASIS offering titles in a wide range of subjects featuring content from hundreds of publishers.

Ebrary – content for the ebrary platform for e-books available through OASIS offering titles in a wide range of subjects featuring content from hundreds of publishers.

EBSCOHost – eBook titles on EBSCOHost platform are available through OASIS providing additional options to the user.

EDI Ordering – Electronic Data Interchange is a document standard which when implemented acts as a common interface between two or more computer applications in terms of understanding the document transmitted. For OASIS EDI ordering the library would transmit their orders often by placing the files on an FTP server.

Eligibility – this is an administrative feature enabling an OASIS Administrator to set up the mapping of funds, locations and Loan Types on a 'per user' basis.

Excel download – Feature providing the ability for a user to download a list of title records to a tailored Excel spreadsheet with the option to select the data columns most relevant to their query..

Feedback – Feature accessible in the OASIS Menu which provides a facility to submit a form detailing any queries or problem reports in relation to OASIS. (Not for use with order or account queries).

Fill All – Facility to add all or any of Purchase Order No., Fund, Location or Loan Type to a complete booklist at once when preparing an order or a group of selections.

Filters – Filtering enables a user to take a large set of titles and narrow them down. A wide range of filters such as Publisher, Title Keyword, Fund, etc. that can be used in combination are available.

Firm/Approval Orders (formerly Search Firm Orders) – allows the user to search all orders placed. The user can also set specific parameters to limit their search results.

Forwarding – The ability to send a database or **Slip Notification** record on to a colleague, either within OASIS or for colleagues external to the library, as an e-mail, for consideration.

4 + 4 – A search method whereby only the first 4 characters of the Author and Title are needed in the search box.

Help Portal – Comprehensive facility within OASIS accessible from the Menu or Help link at the top of the screen that provides detailed help with any questions that users may have in respect of working with OASIS.

Home Page – Accessible by clicking on the OASIS logo top left of the screen. Contains information on your access levels and includes a 'Preferences' section that enables a user to select the 'landing' page that appears when you log in.

iApprove – The overall service name for *Bookstream* and *Slipstream*, OASIS unique Approval plan and new title notification services.

iFound - OASIS customized out-of-print service.

iFound Cancelled Orders – libraries who subscribe to the iFound option in OASIS can be setup to have out-of-print or out-of-stock firm orders automatically sent to their "iFound Cancelled Orders" list. Items which are ordered through the iFound service which are no longer available are also routed to this list.

iFound List – Orders selected from **iFound** and sent to the Acquisitions go into the Ratifier's **iFound List**.

Inbox – Forwarded titles from library colleagues are usually received under this menu option.

In Stock – Indicates warehouse availability of a title. This is one of a number of stock status indicators used in OASIS.

Interdisciplinary Subjects – Subject descriptors assigned by OASIS selectors to denote books pertinent to fields such as Women's Studies, Environmental Studies, and other areas which often cross boundaries of more traditional fields.

Invoice History - provides a user with the ability to view and/or print any invoice or credit note within their library accounts for **Firm Orders, Approvals** and **Standing orders**.

Lists – each user has the ability to create as many lists of titles as needed. These lists can only be viewed by the individual user and cannot be shared. However, titles from a list can be forwarded to colleagues using the 'List/Forward' action.

List Maintenance – maintenance can be done from the **Administration/Manage Account** tab or from the **Lists and Groups** folder, enabling users to manage their lists, slip notifications and forwarding targets.

Lists & Groups – The menu where users can manage their lists and 'Community Groups' they create.

Lite User – provides user access to a simplified version of OASIS. Some of the features available in the main OASIS are not present in OASIS Lite, such as 'Saved Lists', detailed Management Reports, book Approvals, etc... The purpose of OASIS Lite is to provide an interface for basic searching and selecting of

titles for individuals who do not need a broad array of features available in the main OASIS. The users login ID determines access to OASIS Lite or Main OASIS.

Lookup Search – Facility within *Order Status* to make a quick and simple search.

MLO – acronym used for **Multi-line Ordering** - “see” **Multi-line Ordering** for more information.

Mandatory Fields - Order Info can be set up so that the selection or order cannot proceed to the next step unless all of the required fields are filled in. This can be done for the Selector as well as the Ratifier. When a title is missing required information, it will appear back on the list with a message highlighted in red indicating which required information is missing, such as: Fund and Holding Code fields are required.

Manage Account – Feature that allows users to set display and other preferences for their personal account, as opposed to Manage Group, (see below) where Administrators manage library-wide settings.

Manage Group - Feature that allows an administrator to set a range of display and other preferences for all users.

Management Reports - Library expenditure and other data presented in Excel files that may be extracted from OASIS as ‘management reports’ under a range of parameters, including the ability to select Approval, Standing Order, Firm or All order types and flexible date parameter selection. Generated reports are produced automatically and will be e-mailed promptly to the designated user.

MARC download – Facility to download MARC records from OASIS into a library system or local PC file as required.

MarcStream – The original name in OASIS for Patron Selection records was MARCStream (use now phased out).

Mark All - The "Mark All" button allows a user to take bulk actions against all of the titles on a List being viewed.

MUPO – unlimited user.

Multi-line Ordering - Opt-in feature which enables one-step ordering for library systems with centralized acquisitions for multiple sites or locations. Libraries can place orders for multiple-copies of a single-title, with varying order information (such as fund, location, loan type, quantity).

Multi-user License/Licence – for platforms using this terminology multi-user license provides access for up to 3 concurrent users.

MyiLibrary - MyiLibrary is an eBook platform. All MyiLibrary titles are available for purchase on OASIS.

MyiLibrary License – As with any eBook platform, libraries need to agree to certain standard terms and conditions in order to use the MyiLibrary platform.

NLL – Non Linear Lending ebook platform license model. NLL allows for the purchase of a title that can be used simultaneously by a number of patrons. For a more detailed definition refer to the “Non-linear Lending License” definition below.

New Title Notifications – Sometimes referred to as ‘Slips,’ these are customized announcements of forthcoming or recently published titles likely to be of interest to a user. These notifications are generated by a ‘profile.’

No Sales Rights – titles restricted for sale when a publisher does not have rights in the country or region where the user’s library is located. Whenever we know this to be the case, the OASIS “browse row,” or upper part of the OASIS screen, will display this message: “No Sales Rights in Your Region.” The “Availability” field in “Title Details,” or the lower part of the OASIS screen, will display the same message.

Non-linear Lending License/Licence - Non-Linear™ Lending provides multiple concurrent accesses to content. Each "copy" of an ebook that a library purchases via Non-Linear Lending allows up to 325 loan instances* per year. At the end of the lending year, these 325 loan instances automatically renew at no additional cost. Unused loan days cannot be carried over from year to year. Cost for NLL is generally the same as hardcover list price. Please note that Non-Linear Lending is a perpetual ownership model and the customer is provided with an archive copy of the book.

Non-Subject parameters – Components of a ‘profile’ that include Country of origin, language, binding type, readership levels, and other descriptors applied by our selectors to new titles.

OASIS Accepts Orders – Stock status indicator displayed in OASIS to show that while a given title may not be held in stock, it is not known to be out-of-print and it can be normally ordered, and supplied if available.

OASIS Change Log – A listing of all new features, improvements, and bug fixes.

OASIS “Play” – refers to a site which is a copy of the live database for OASIS users to use in training and testing. Data on this site is updated periodically from the live site.

On hold for alternate editions – Menu option where users can review and take action on titles generated by their profile that are waiting for the publication of a preferred edition, e.g., a cloth title waiting for its corresponding eBook.

OpenURL – A standardized format of the Uniform Resource Locator (URL) enabling users of one Internet resource to directly access another. For OPACs and other library resources that are OpenURL-compliant, OASIS can perform title, author, and ISBN searches with this protocol. For syntax examples go to: <http://en.wikipedia.org/wiki/Openurl>.

Order History – Menu option under **Search Orders** providing the user with a customizable template to view open, invoiced and cancelled orders within a set time period.

Order Info - The OASIS facility for adding local data such as fund/budget, location, or loan type to selections and orders.

Order Status – OASIS facility displaying current position of any order from placement to fulfillment.

Other Electronic Book - refers to either eBooks that OASIS cannot provide (i.e., publisher platforms, mainly), or eBooks on an aggregator platform we can provide, but which the library has not asked us to enable for them. Customers have the option to suppress these by unchecking the box in their Manage Account>Preferences tab for 'Other Electronic Books'.

PDA – acronym used for **Patron Driven Acquisition**.

Patron Selection Records – Under the New Titles menu, OASIS displays a list of titles provided to a library as MARC records for uploading into the library's catalog for viewing and selection by library patrons.

Platform - technical means for distributing, storing, or reading an e-book.

Play – a copy of the “live” database where customers can login to test workflow processes and features within OASIS.

Print pre-publication match – A New Titles menu option whereby all new titles that enter our Approval/Slip profiling process are matched with rudimentary pre-publication metadata against library profiles. Users if they wish can take action on these pre-publication titles.

Process List – A button that activates batch processes on lists of titles, under prior title-by-title actions marked by a user.

Profile – Detailed specifications by subject, publisher, and other categories for an Approval Plan or a Slip Plan which guide us in which new titles will be of enough interest to a library to merit automatic supply or automatic notification.

Quick Search - A 'Quick Search' box is located in the upper right corner of most OASIS screens. This search box provides a quick option for basic author, title, keyword, and ISBN(s)/ISSN searches. It can also be used to search order information (such as invoices, OASIS Control Numbers, and PO numbers).

Ratifier – Person at the library authorized within OASIS to place orders or to download titles for ordering via EDI from the local system.

Recycle and Recycling Box – List accessible via the Menu where any titles 'Rejected' or 'Recycled' from lists within OASIS are consigned and remain for a predetermined length of time, and so recording a negative selection decision. 'Recycled' titles differ from 'Deleted' titles in that the negative action is not recorded for Deletions.

Reject – See **Recycle**

Request Recipient – Person designated by the library to receive ‘Requests’ from individual outside selectors who have been set up as ‘Requestors.’

Requestor - OASIS Lite Requestor is designed for basic searching and selecting of titles for individuals who do not need the broad array of features available in the main OASIS. Anyone setup as a Requestor can quickly search and submit a request to their library liaison (recipient). Requestors access OASIS using Shibboleth login for authentication.

Review Shelf – The OASIS Review Shelf is a collective term for two New Title menu options, Review Approval Books and On Hold for Alternate Editions, both of which enable users to ‘review’ and take action on Approval Plan titles.

Rush Orders – Urgent order handling service.

Routing – Facility to send particular new title notifications to specific users.

SUPO – single user license.

Saved List – Users can place search results on a list that is saved for later use.

Search All Titles – Search form that enables a user to search the title database using a wide range of parameters. Accessible from Menu. (“**see also**” **Advanced Search** and **Simple Search**.)

See inside the book – the blue "See inside the book" link may be clicked in order to view the contents of any eBook available from MyiLibrary. The link is present in the browse row of MiL titles and the associated paper copies

Selector – Person responsible for the selection of books for the purpose of placing orders. A selector’s selections are often passed to a Ratifier for creation of orders.

Selector Signature – Shortened form of the name of the user who is responsible for the creation of a given selection or order, appearing in the browse row.

Series Block List – A list of series that will not be sent on a library’s approval plan and/or your slips plan, based on a list provided by the library.

Shopping Cart – List where a user can accumulate titles before selecting or ordering them, accessible from the main menu.

Simple Search – provides the user with fewer search options.

Single-line Ordering - form provided for placing orders for a single ISBN which is billed and sent to the same location despite the number of copies purchased.

Single screen – User option to display search results and other browse screens as a single page rather than in a split screen.

Single User License/Licence - single-user license provides access for 1 user.

Slip Notification – Electronic delivery of information about new titles, matched to a user’s needs by a profile.

Slipstream – Name for New Title Notifications or Slip Notifications, no longer used.

Solution – A name, being phased out, for standing orders.

Split screen – Default way in which title search results and other browse list displays may be viewed, consisting of a abbreviated record at the top of a screen known as the Browse Row, and a complete record at the bottom known as Title Details.

Standing Orders – a publication which is updated and repeated on a regular or irregular basis or a succession of volumes or issues published with related subjects or authors.

Start Node – landing page. In OASIS this can be set to the user’s needs.

Subject parameters – The part of an Approval or Slip profile based on the Library of Congress, Dewey, or National Library of Medicine classification system.

Templates – provide users with the ability to create, edit, delete and save any set of local data as a template (which can be modified) for reuse on future orders. Default templates can also be set by individual users or by the Administrator.

Textbook (Perpetual) License/Licence - EBL’s Textbook Lending model functions the same way as Non-Linear Lending, but access is limited to a maximum of three simultaneous users.

Three User License/Licence –

Title Details – Bottom part of the screen in a split-screen view of titles, providing all bibliographic elements.

Unlimited Access (Perpetual) - Unlimited Access ebooks have no restrictions on the number of loan instances or number of simultaneous users allowed. A loan instance is defined as access by an individual patron within a 24-hour period that exceeds the free browse period or if the user chooses to download, copy or print from the ebook. EBL ebooks have a free browse period (10 minutes for owned books and 5 minutes for non-owned books); when a book is browsed, it is not counted as a loan instance.

What’s New (in OASIS) – Information displayed to a user at login updating latest changes to OASIS