Title Source 3 and 9xx ordering

Title Source 3 setup

The holding code and fund code used for Title Source 3 cart grids must match exactly the holding code and fund code information listed for your library in SIRSI. Any discrepancy in either code will prevent the orderline from being built in SIRSI.

Tip: Do not use a shortcut to access the Title Source 3 logon screen. Always access Title Source 3 from the Baker and Taylor home page at http://www.btol.com/ This will log you on to the least busy server for the best possible response time.

To create a Grid enabled cart From Title Source 3:
Note: You may fill in any additional information you think useful on the Cart setup screen that is not included below.

1. Click on the Carts/Lists Tab.
2. Click on Create Cart, on the left hand menu.
3. Click in the box to the right of Grid Enable.
4. You must select a Grid format. Click on the radio button to the left of Default, Template or Blank to indicate the desired Grid format.
5. If you select Default as your grid format;
    - Select a fund code, holding code and quantity to be used as the default. These values will automatically be included in each grid when you click the "**add my defaults**" button when adding titles to your cart. You will be able to modify these values or include additional holding and fund codes on individual grids as you add titles to the cart.
6. If you select Template as your grid format:
    - Select a template from the drop down list. The holding, fund code and quantity information attached to the template will automatically be included in each grid when you click the "**add my defaults**" button when adding titles to your cart. You will be able to modify these values, select another template from the drop down, or include additional holding and fund codes on individual grids as you add titles to the cart.

    To create a template in Title Source 3:

    - Logon to Title Source 3 with an administrative logon.
    - Click on the System Setup tab.
    - Click Grid Template.
    - Click Add.
    - Template name is what will appear in the drop down list for template selection. Use a name that is somewhat descriptive of the template. (i.e. The template BHNALL1, is one copy for each library in Big Horn Co. library system, or BHNALLJ1 is one copy, each library using the juvenile holding and fund codes.)

- Enter a brief description of the template.
- In the selector area, select a holding, fund code and enter a quantity. Click Add. This information has now been added for this template. Repeat steps 7 & 8 for each additional holding or fund code you wished to be associated with this template.
- When you have included all the holding and fund codes for this template, click save and exit or save and continue if you wish to create additional templates. You will need to assign the template to any additional Title Source 3 logons that may need to use the template.
- Click on Back to Admin.
- Click on Admin.
- Scroll down and click on the name you wish to assign the template to.
- Click on the Assign template button.
- Click on the box to the left of the template you wish to assign to this user. Click update at the bottom of the screen.

7. Libraries that use WSL Centralized Acquisitions for invoicing should enter your library?s 3 or 4 letter code in uppercase followed by the date in the Purchase Order field (e.g. BHN-03-29-05). Other libraries may or may not choose to use the Purchase Order field.
8. Click update. You are now ready to add titles with grid information to your cart.

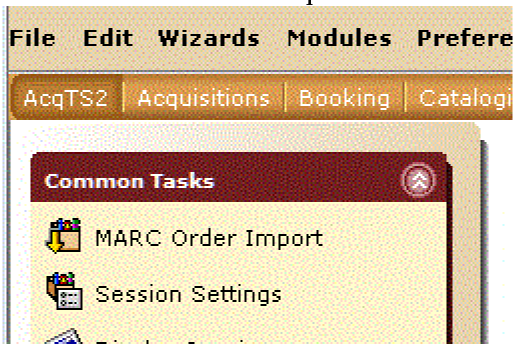
Downloading to Symphony

To Download the cart to create the SYMPHONY purchase order:

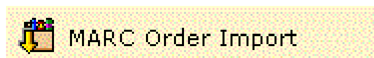
1. Click on the Carts/Lists tab.
2. Click on the radio button to the left of the cart you wish to download.
3. Click the Download button.
4. Click on the Marc download radio button.
5. Choose GRID from the Select format drop down menu.
6. Click Download.
7. Follow the directions on the screen. Note the location on your machine where you have downloaded the file. Renaming your file with your library?s 3 or 4 letter code will make it easier to identify.
8. Once the download is complete you may logoff Title Source 3. Remember to use the logoff button on the left hand side of the screen.

From Sirsi:

1. Log on to SYMPHONY using the logon created to run the 9xx loader.
   NOTE: Centralized Acquisitions users will need to choose the acqts2 toolbar.



To transfer the cart file from your computer to the SIRSI server:

1. Click on the Marc Order Import Wizard. 

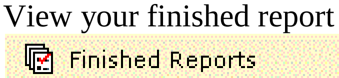
2. Click on Import
3. Click on the gadget next to the Source data well and locate the file that contains your Title Source 3I cart.
4. Enter your library?s 3 or 4 character code in lowercase as the destination.
5. Click Import at the bottom of the screen.
6. Click Yes to the "is diskette ready?" message.
7. Click No to the "Are there more files to upload?" message.
8. Click cancel

The next step is to load the bibliographic records downloaded from Title Source 3 to the WYLD database by running a report.

Create a template to save time on future loads:

1. Click on the Schedule New Reports wizard. 

2. Select the Acquisitions load report tab
3. Highlight the TS3bibload report and click the setup and schedule button.
4. Click the Load tab
5. Click on the down arrow next to the "File to load" field and highlight your TS3 bib file.
6. Select the Order Options tab
7. Next click on the Fiscal cycle gadget and select the correct fiscal year.
8. Click Save as Template.
9. To load your TS3 bib records select the Templates tab
10. Highlight the report you just created.
11. Click on "Setup and Schedule.
12. Click run now.
13. View your finished report by selecting it from the Finished report tab.



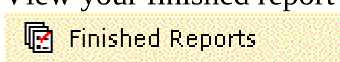
14. To find the file name for the next step look for the line "Flat order records have been written to /s/sirsi/Unicorn/Marcordimp/Orders/ ..." The file you will be looking for starts after the "/Orders/" and will be named with the login you use plus the date. Example, /PARKWSL0607a.

You are now ready to load the order information to WYLD.

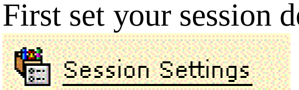
1. Click on the Schedule Reports wizard. 

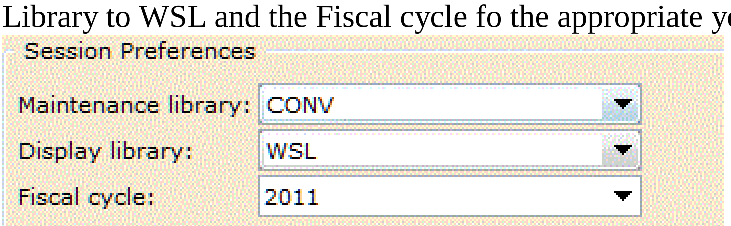
2. Select the Acquisitions load report tab
3. Highlight the TS3orderload report and click the Setup & Schedule button.
4. Click the Order Loading tab
5. Click on the down arrow next to the File to load field and highlight your order file.
6. Click "Save as a template".

   From now on when you run this report you can select it from the template tab. However, you will always need to select your file as the name of that file will change each time the TS3bibload report is run.

7. To load your TS3 order records select the Templates tab
8. Highlight the report you just created.
9. Click on "Setup and Schedule.
10. Click run now.
11. View your finished report by selecting it from the Finished report tab.


Now you are ready to link the orderlines to the titles. This process creates a dummy copy for your library. The item type will be new and the location as on-order. Patrons will now be able to see what is on order and place holds against those items.

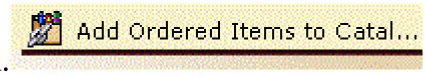
1. First set your session defaults, click on Session settings under the Common group.


2. Click on the "defaults" tab and set the Maintenance Library to your library, the Display Library to WSL and the Fiscal cycle fo the appropriate year.


3. Click on the Orders group down arrow. 

4. Click on the Display Order wizard. 

5. Enter your order id. (This will be the same as what you entered in the Title Source 3 Purchase Order field.)

6. The list of titles on the order will appear.
7. Open the first title by double clicking on the title, this will open a window which you wil then close.
8. Click on the Add Ordered Items to Catalog wizard. 

9. Click on current title.
10. Check the Add item box.
11. Click on Add/Update Items button.
12. Click Close.
13. Highlight the next title.
14. Repeat steps 7-13 for each orderline.