USING TITLE SOURCE 360

Introduction

Baker & Taylor has introduced a new ordering platform which is similar to the previous Title Source III (TS3 for future reference) ordering platform in that it still uses carts and One-Click MARC to send the order with an FTP reply.

The new platform – Title Source 360 (TS360 for future reference) does have some differences. It has been created to make library management easier, so you can have several people working in your carts with different permissions, or you can merge several carts together, or you can separate items out of your carts…there are so many options!

Step 1.

Logon to TS360 at: https://ts360.baker-taylor.com

- ➢ Use the same Login ID as TS3 – it begins with PLS
  Your password is: **Peacelib1**
    - ▪ The first time you use TS360, you will get an "agreement" screen – click to agree
        - • Select "All" for type products (where the Paw Prints is also a choice)
            - • You will now be directed to your home page

Step 2.

On the home page, click on "My B&T"

- ➢ Select "My preferences"
    - o Click on the "General" tab:
        - ▪ Keep the email address provided
        - ▪ On "Default MARC profile, select: "01- Book download to Polaris"
        - ▪ Choose your various views, product types, audience types, search preferences, cart preferences, dupe check preferences. (Note: Gardners is British titles, and you can click "no" for it, since we can order those titles as well)
        - ▪ "Default account/settings" should be:
            - • Book account: L502666 Peace Library System
            - • Entertainment Account: 40014612 – ENT – Peace Library System
        - ▪ Choose your "product type filters"
            - • In "Cart preferences" – choose a quantity of **1**
            - • Click "Save"
    - o Click on the "Grid Fields" tab
        - ▪ Choose your various Grid fields display settings:

- Location: Select: "Show grid description" then select your library's code (ie: PLS for Peace Library System)
- Fund: Select: "Show grid code" then select your library's fund code (ie: 0100 for PLS)
- Collection: This is optional – click on both drop-downs to determine if you wish to use this setting.
- Quantity: Type in "1" – this field **MUST** be filled in
  - Click "Save"

Step 3.

- Click on the "Carts" tab at the top of the TS360 home page
  - Click on "manage carts": click on the "Default folder" button located on the left side of the page. This is your root folder – DO NOT USE OR DELETE THIS FOLDER EVER!
    - Click on the "New folder" button above the default folder.
      - Give the new folder a name (ie: January, 2017)
        - Save
    - Click on the folder you wish to use.
    - Click on the "New Cart" button located on the right side
      - Enter a cart name
        - Check: "Set as Primary" if you wish to use this cart for ordering. Your Primary Cart will **always** be featured at the top of every page in the system for quick, easy access.
          - **NO** P.O. # is required
          - ALWAYS select the Cart Default Grid Distribution choice as: "**Use my default quantity**"
            - Note: at this point you may wish to change which folder you would like the cart to be placed in (you have the option to create a new folder, see New Folder button).
        - Click "Create Cart" when the applicable fields are completed.

If you set it as your primary cart, you should now have the cart name on the top line of your home page (see highlighted cart below):

At this point you can begin to search and fill your cart.

Step 4:

Click on the cart name to open the cart

- ➢ Begin search by entering item in search field at the left of the cart icon:

- ➢ Click on title of item you wish to order
- ➢ Scroll down the page and you will find your grid button on the left – it will show a "0"
  - o Click on the grid button
    - ▪ Your grid will appear.
      - • Click on the "+" sign to create the grid line for this item.

- "Check" the box on the far left of the "Grid distribution" line you just created.

***Always check the "Publisher status" at the top right of the "General Title Information" portion of the item screen. OK to order: Field is blank = in stock
                                                             Not yet published (if it's available within 4 months)
NO other status can be used, since those items will not be available for us to order.

- o On the far right of the title, your will find "Ordering information"
  - ▪ Click on the "Add" button
    - • OR: Click on the arrow beside the "Add" button to select a different cart
      - • Your item is now in the cart!

- ➢ To check your cart – simply click on the carts tab on the far left side of your page – it's an easy access point, but you can also use the "Carts" tab -> "Manage carts" on the top of the page.

Once you've become comfortable using TS360, when you've logged in, you can also simply start entering searches in the Product search field, select a grid and add to any cart using the dropdown by the "add" button.

- Continue filling your cart(s)

Step 5:

Send your filled cart to Peace Library System:

- ➢ Select the cart you wish to send
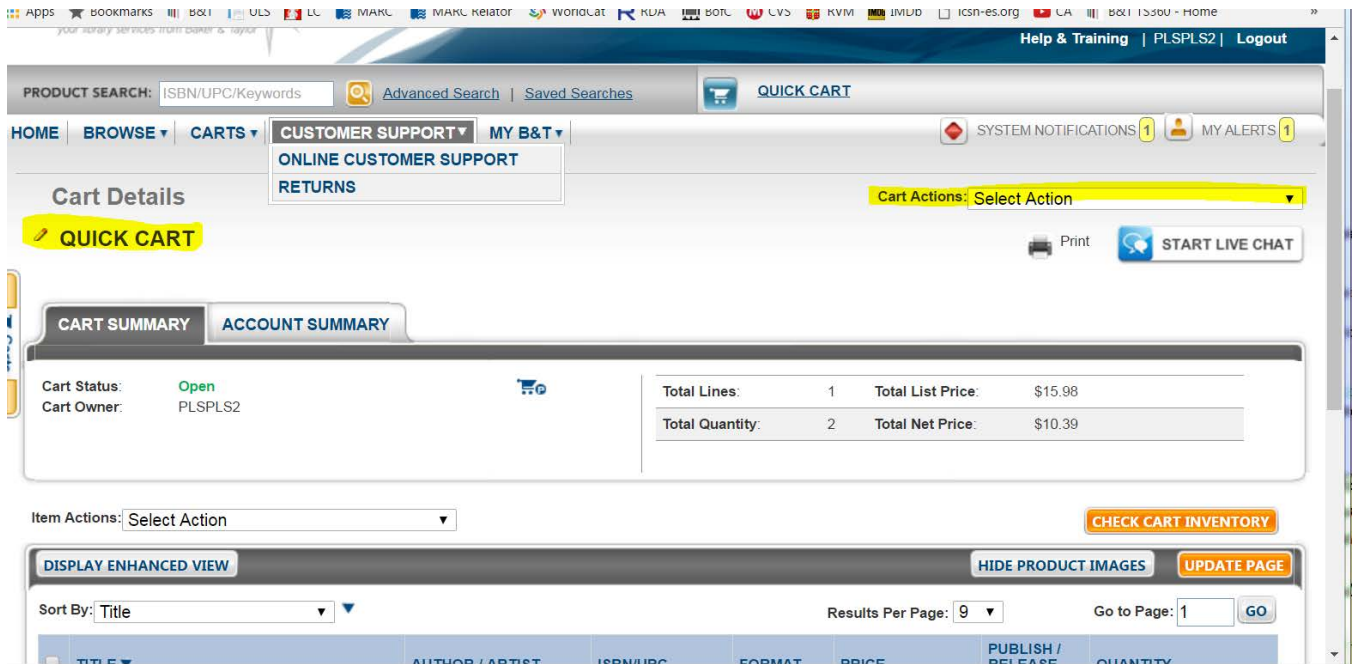 - o Click on the "Display Quick View" tab (highlighted below):

o   Select "Cart Actions" on the top right:

▪ Select "One-Click MARC"
▪ This pop-up will appear:
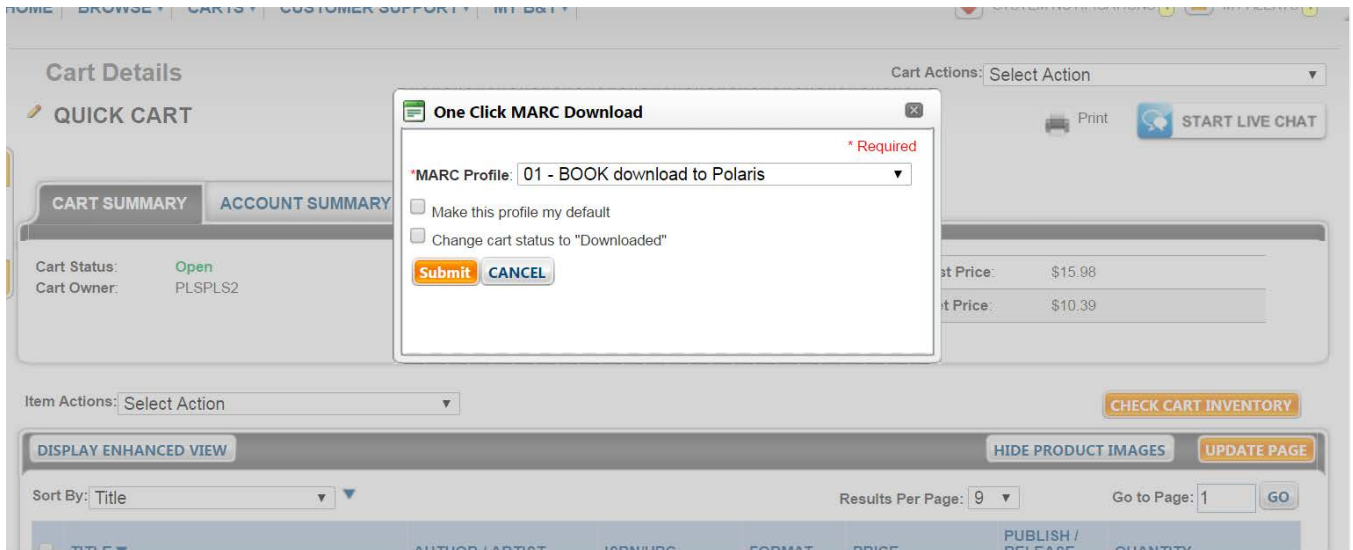
▪ Select the correct MARC profile for the format in your cart
   o   You may check off any or none of the options on the pop-up.
      ▪ ***Do no select "Change cart status to "Downloaded", unless you want this cart to be closed. This cart will no longer be available to modify in the future.
         • Click "Submit"

You should receive this message:

- o Click "OK"
  - Click on the "Carts" tab on the side of your screen, and your cart should now have a blue FTP status.

Step 6:

IMPORTANT! Please email Peace Library System indicating how many titles you've ordered and the name of your library at: ordering@peacelibrarysystem.ab.ca

Please use this email if you have any questions or need any further helps.