Using Baker & Taylor Title Source 360 with grid templates

https://ts360.baker-taylor.com

Please use Google Chrome as your browser, per B&T instructions

Creating a cart

Open the carts drawer at the left of the screen.

Click the New cart button at the top center of the pop-up box.

In the Create new cart box, type in your cart name;

Click Set as primary;

Make sure your Book account is correct;

Click the Grid template radio button to make sure your library's location appears

Click the Create cart button.

Searching and adding items to a cart

There are three main search methods:

1. You can add any item displayed on-screen to your primary cart by clicking the "ADD" button.
2. You can use B&T-generated lists under the Browse tab to choose titles.
3. You can also use *Booklist* lists from CCLS in the Shared/received folder to choose titles.
4. Click Advanced search link at the top of the screen. The search screen will display.

Enter search criteria and click "Search" button.

View title info and reviews by clicking title links.

Click the "ADD" button to add the displayed title to your primary cart. If the Add button is not visible on your screen, cut and paste the ISBN into the Product search box at the top left of the page.

Checking for duplicate orders

Click the "C" and "O" icons from each title record for a list of duplicate orders from B&T. "C" means it exists in a cart already; "O" means it has been ordered. Open the link to see which libraries are involved.

Adding gridlines to your cart

There are two main gridline methods:

1. If you have only 1 fund code:
   When you created your cart, you chose a Grid template.
   Each title will be added to your cart with its template already in place.
   OR
2. If you will have more than 1 fund code, add templates as you add titles:
   Search for an individual title.
   Click Grid at the bottom of the entry.
   From the Add gridlines menu, choose your library's entry.
   Your grid codes will appear below.
   Check the boxes at the left of the gridlines you do not want to use.
   From the Grid actions menu, choose Delete.
   Click the "ADD" button.

Transferring a cart for ordering

Locate the cart you want to order in the carts drawer. (Check the Default folder.)

Double-click the cart name to open it.

Sort the cart alphabetically by title.

Click the Cart actions menu at the top right.

From the drop-down menu, choose "transfer", and click "go".

Find the name and account of the recipient (Chris Spink, CCLS575NY to submit a cart to order. You will likely need to scroll down to find it. Sometimes it takes time to load.)

Leave the Keep a copy… box unchecked. This will help to prevent duplicate orders.

Click the "transfer" button.

Using a shared cart (*Booklist* orders)

To allow for direct billing, we are no longer able to add orders directly to shared carts.

Click the Carts drawer.

Click the Shared/received folder.

Choose a cart from the list that displays. Shared carts will be available for 2 months after the *Booklist* issue date.

Click the cart name to open it.

View title info and reviews by clicking each title link. Return by clicking the Back to… link at the top left.

From the full screen, click the Copy button at the right and choose the cart to add it. (You will need to use method #2 above to add the gridlines.)

Or, you can print the cart and use the copy to add items to your order list.

Reports for MS Excel spreadsheet on-order files

Make sure you are using Google Chrome as your browser.

Click the Carts tab at the top of the screen, then Manage carts. (Note: this will not work from the Carts drawer.)

A list of carts will display. Click the Select action menu at the right of your cart.

Choose Download/export cart.

A pop-up will appear, asking to choose the format of your report. Choose Lawson Excel, and then click Download.

Click Save.

Another pop-up window will appear with the Excel file attached.

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TS3 tips & tricks

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TS360 navigation

1. Be sure to click Add, Save or Update for each change you make to a gridline or cart.
2. You are welcome to use B&T-generated lists and publications to place orders. You can find them under the Home and Browse tabs.
3. In the Carts drawer, choose Ordered and submitted for a list of your ordered carts.
4. Following the "O" link will give you the status of an item you have previously ordered.

Grids

5. There must be grid codes applied to every title ordered. Orders do not properly load at B&T without them, nor can they load into Sirsi.
6. The "notes" field in the grid template does not transmit to B&T. It is for your own use only.

CCLS

7. To keep track of your orders, I will use this format for PO numbers: <delivery code>-<date> (OLE-120705).
8. Please keep CBA orders on separate lists, to minimize confusion in the CCLS business office.
9. Audio books can be ordered from B&T. Center Point and Thorndike large print can be ordered by slip.
10. Call Chris (716-664-6675 x 248) with questions, problems, etc.

Your favorite suggestions and tips are welcome, too! Contact Chris.

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