

# B&T Academic Title Source 3 Cheat Sheet

## Log into Title Source 3:

- To access Title Source 3 Academic Version, please visit <http://academiclibrary.btol.com>.
- Your Login and Password will be the same as Title Source 2 or for new customers login and password will be provided by Electronic Distribution.
- Anonymous login is allowed for non-registered users. Primarily an anonymous login is used for a library where students or a number of individuals can access TS 3 without having to acquire/use a password. Anonymous users have access to creating carts, but these carts are not saved after they log off. The Anonymous login feature requires an IP address be setup before it can be accessed. Please contact your Sales representative if you are interested in this service.

## Changing Landing Page for TS3:

- Customers have the option of landing on the Title Source Homepage or the Search page. The default for Title Source 3 is the homepage.
- To change your landing page, click on Preferences at the top menu bar on the home page.
- You will see General Preferences: E-mail Address, Password, Timeout Period.
- The last drop down menu, Select your Landing Page, allows you to customize whether you land on the Home Page or the Search Page
- Please choose the appropriate page, click Submit.
- You must logout of Title Source 3 and log back in to reset your homepage.

## Creating Carts:

- Click on Carts header on the toolbar. You will see what carts you have created. There are several ways to create cart, utilizing quick cart setup or full setup. Quick cart set up allows you to name a cart and affiliate that cart with a specific account. Full cart setup allows you to assign discounts, P.O. numbers, and contribution and requisition dates, and statuses. If you create a cart using Quick Cart setup, you can always return to this cart and apply the cart details that are in Full Setup.
- To Create a Quick Cart:
  - On the Left hand side of the screen, you will see the Cart Manager.
  - The Cart manager allows for a quick setup of New Carts or full setup. Use the form in the cart manager for a quick setup of a New Cart, or click Create New Cart - Full Setup.
  - Enter a cart name and select the appropriate account. If you would like to order audiovisual material, please make sure you select your audiovisual account from the list.
  - Click create cart. Your cart will now be added to your cart listing and will be in the Build Status.
- To Create a New Cart with Full Setup:
  - From the Cart manager, click the link Create New Cart-Full Setup.
  - This will bring you to the view/edit screen of your cart. Here you can name your cart, assign a discount, P.O. number, and set contribution and requisition dates. Carts can also be created to be private carts (Only viewed by you) or shared carts (Viewed by all users).
- **A cart must be created before you can add any items.**

## Cart Statuses:

- Active: Carts that are sorted by active status are carts that are in build status, meaning that they are open to contribution and requisition and have not yet been transmitted for ordering.
- Pending: Carts that are in Pending Status are similar to Archived carts. Place carts in pending status after you've ordered a cart to save it for duplicate checking. You are unable to add new titles to a pending cart.
- Confirmed: Carts in this status have been received by Baker & Taylor for ordering.
- Open Contribution: Carts in this status indicate that users are allowed to add titles to a shared cart, indicate a quantity, notes and grid distribution for a specific time period.
- Open Requisition: Carts in this status indicate that the cart is no longer capable of contribution, providing a stable environment where users can review the cart and add requisition information for a specific time period.
- Locked: Carts in this status are locked for a temporary time period which restricts all access by users except the cart owner. The cart owner has sole capability for making changes to any element of the cart.
- Closed: Carts in this status signal the end of expiration of contribution and/or requisition time period. Carts in the closed status are available to all users for viewing.
- Ready-To-Order (RTO): Once a cart has been finalized and prepared for ordering, the Cart owner or account administrator can change a shared carts status to RTO. Any user who has ordering capability can apply cart

# B&T Academic Title Source 3 Cheat Sheet

header information (po #, fund code, user notes, and account #) to an RTO cart. Private carts may be placed in RTO state to allow someone with ordering rights to process the order.

## Viewing Carts:

- Click on Carts header on the toolbar. You will see what carts you have created.
- Within the Cart Manager, You can apply cart listing filters. You can sort your carts by Cart Group. You can view your own personal carts, shared carts created by you, shared carts created by all users or all carts. Make sure Filter By: is on the correct filter for the carts you wish to view (Build, Confirmed, etc.).
- The Ordering, Transmitted and Price Check statuses are only applicable while these processes are being completed.
- You have the option to hide the Cart Manager on this page. You simply need to click the hide filters feature in the left hand corner of the Cart Manager.

## Deleting Carts:

- There are several ways to delete a cart. Completing this action will eliminate duplicate checking for titles in a cart.
  - To the left of each cart, there is a cart functions pull down menu. You can select the Delete function. Click go. A popup will ask if you are sure that you would like to delete this cart. Click Ok. **This is irreversible.**
  - To Delete Multiple Carts: select the carts you would like to delete by checking the box to the left of the name of the cart. Go up to the Multiple Cart Functions drop down menu in the Yellow Toolbar at the top. Select Delete, click go. A popup will ask if you are sure that you would like to delete this cart. Click Ok. **This is irreversible.**

## Downloading Carts:

- From the cart function pull down menu, select download.
- Downloading a cart is like exporting a cart to an excel file. You can download your cart in three formats: Simple, Basic Title ASCII and Basic Title ASCII Expanded. Downloading a cart in Simple format provides you with the ISBN's of all the titles in the cart in a notepad format. Basic Title ASCII provides you with a list of the titles in your cart in Excel Format.

## Mass Maintenance of Carts:

- Within the Carts Tab, select Multiple Carts Function. This function allows you to delete multiple carts at a time. Select the appropriate carts you would like to delete and choose delete from the Multiple Carts function pull down menu. **This is irreversible.**
- Within a cart, you can complete several mass maintenance functions. From the carts function pull down menu, select View/Edit.
- To the right of the screen, you will see Apply DNE, Apply Duplicates and Mass Maintenance buttons.
  - Apply DNE: This function allows you to apply a DNE profile and check if any titles exceed your DNE profile specifications.
  - Apply Duplicates: This function allows you to run a Duplicate check and search for duplicate titles as specified by your duplicate profile. Please note a duplicate profile must be set up prior to using this function.
  - Mass Maintenance: This function allows you to apply a default quantity to all the titles in your cart, apply line notes or addend line notes for every title within your cart, remove import titles and remove titles with a quantity of zero.

## Downloading MARC Records:

- From the cart function pull down menu, select download.
- Select the second option, MARC download. This function allows you to download records to a specific file on your computer for ease of ILS identification.
- Select Default or custom ILS MARC record format. Default offers no customization and no specific tags.
- Click Download. Please follow download instructions to download MARC records to your computer.
- You can view the records you are attempting to download by selecting Click Here to View the MARC records.
- This will bring you into MARC view. Here you can see the MARC records you intend to download and the tags associated with these records.
- Some titles will have more MARC record information than others.

## One Click MARC/MARC Profiler:

# B&T Academic Title Source 3 Cheat Sheet

- One Click MARC allows your library to establish customized MARC records as order records. This function allows for a library administrator to create a MARC profile to designate an FTP site for MARC record deposition and retrieval, MARC Record tag customization, Grid export and special code customization.
- Please have your administrator contact Baker & Taylor product support if they need help establishing their MARC Profile or would like to have this feature available to their users.
- One Click MARC and the MARC Profiler are standard features of Title Source 3 Gold but can be added on as additional modules for Title Source Silver and Basic.

## Transferring Carts:

- From the cart function pull down menu, Select Transfer.
- This function allows you to transfer carts between multiple users within your access to Title Source 3. You can select the user and send them a copy of your cart. This cart will appear in their cart listing under the Cart Header. This cart will be in build status and will have a cart note indicating who the cart was from.

## Copy Cart:

- The new cart must have a different name & PO# than the cart you are copying. Select the Copy function from the dropdown menu. Provide a new cart name and click the copy button. You will shortly see a copy of your cart in your cart listing. This new cart will be in build status and in the cart notes, you will see that it is a copy of the original cart.

## Printing Carts:

- There are several ways to print your carts.
- Print a Downloaded Cart:
  - Please follow instructions on how to download a cart. Download this cart into Excel format, print details of your cart as an excel spreadsheet.
- Print a Cart Report:
  - In addition to downloading a cart, you have the option of running a cart report. Cart Reports can be downloaded into Adobe Acrobat, Excel, Word or Rich Text Formats.
  - From the Cart function pull down menu, select Reports. Click Go.
  - This will bring you to the Cart Report pop up window. There are two types of reports:
    - Cart Reports: This type of report provides you with a list of the titles within your cart in a multi-line view.
    - Slip Reports: This type of report provides you with a list of the the titles within your cart in a slip view.
    - Academic Reports: This type of report provides you list of title within your cart in a single line view.
  - Select the Appropriate report type, select Process Report
  - Open or Save the report onto your computer.
  - Print Cart Report.

## Basic Search:

- Click on the Search Header. This will bring you to the basic search page. You can choose to complete a basic search or an advanced search here.
- Select Product Type (Books, Video, Music, Software & Games or All Product Types).
- Select Appropriate search Criteria.
- Enter Query.
- If you are entering multiple search queries, please include the appropriate operator ( AND, OR, NOT)
- Click Search.

## Search with Filters:

- Click on the Search Header. This will bring you to the basic search page. You can select to complete a basic search or an advanced search here.
- Select Product Type (Books, Video, Music, Software & Games or All Product Types)
- Select appropriate search criteria
- Enter query
- If you are entering multiple search queries, please include the appropriate operator ( AND, OR, NOT)
- Scroll down the screen to the search filters

# B&T Academic Title Source 3 Cheat Sheet

- Apply search filters to limit your search. Select down arrow to the right of the search filter criteria to expand list of filters. Select appropriate filter.
- Make sure you mark the “**search with filters**” box below the Search button to ensure these filters will apply to your search.
- Click Search.

## Advanced Search:

- Click on advanced search under the search header from the Search page.
- Select the product type. You have four Categories (Books, Video, Music, Software & Games or All Product Types.)
- Input your search criteria into the box by clicking in the box.
- Insert search criteria string such as kw=Meteorology. For search indices and additional help, Click “See Index Codes”
- Filters can narrow your search but may also narrow it so much that you receive zero search results.
- Scroll down the screen to the search filters
- Apply search filters to limit your search. Select down arrow to the right of the search filter criteria, select appropriate filter.
- Make sure you mark the “search with filters” box below the Search button to ensure these filters will apply to your search.
- Click Search

## Search Results Display:

- When you conduct a search for titles, these results can be displayed in Brief view, extended view, or detail view.
  - Brief view is a single line view of search results that only shows general title information.
  - Extended view is a multi-line view that includes general title information, inventory and ordering details.
  - Detail view looks at each individual search result, providing an individual title, its cover art and full title details.
- Title Source 3 has a default of Brief view for search results. For instructions on how to change your default view, please see Display Preferences. Users can customize their search result views.

## Adding a single title to your Cart:

- Select title from search results, Expand the title from brief view to expanded view to obtain more information regarding title. Click on title name.
- Select the cart you would like to add this title to from the Active Cart Toolbar at the top of the screen. From this pull down menu, you can create a cart or chose a pre-created cart.
- Insert a quantity for this title, click “Add.” This title is now added to the cart you selected.

## Adding multiple titles to your Cart:

- Select titles from your search results page. Input the desired quantity on the right hand side of the page.
- From the cart header at the top of the screen, Please select the appropriate cart of which you would like to add these titles. Select a pre-created cart or create a new cart from the Active Cart Toolbar.
- Above your search results, find the Quick Cart Controls. To add those titles which you already provided a quantity for please click Update page.
- The multiple titles that you selected are now added to your cart.

## Adding an Entire Page of Title to your Cart:

- From your search results screen, you can add an entire page of results into a cart.
- Select the appropriate cart from the Active Cart toolbar or create a new cart.
- Above your results, find the Quick Cart Controls. To add an entire page of titles, select Add Page.
- You will receive a Bulk Add to Cart pop up where you can apply a default quantity for your titles. The maximum quantity is 999.

## Adding all your titles to a Cart:

- From your search results screen, you can add up to 500 search results into a cart.
- Select the appropriate cart for your titles. From the Quick Cart Controls, select Add All. This function will add your search results into a cart.

# B&T Academic Title Source 3 Cheat Sheet

- You will receive a Bulk Add to Cart popup where you can apply a default quantity for your titles. The maximum quantity is 999.
- You can also apply a default quantity to a cart by selecting the View/Edit action under the Carts Tab.
- Please note that the function of Add All is only available for search results of 500 titles or less. If your search exceeds 500 titles, you will not see the Add All function in the Quick Cart Controls.

## Delete a Title from the Cart:

- Click on the Carts Tab.
- Select the appropriate cart.
- Open this cart by double clicking on the cart name.
- Select the title you wish to delete from your title listing
- Under the Quick Cart Controls toolbar on the right hand side of the screen, select Remove Selected Titles.

## Batch ISBN Import:

- Compile a List of ISBN's in a text format, .txt.
- Select Batch Import under the header toolbar.
- Select the Cart you would like to import the ISBN's into.
- Select Browse, choose your Word or Excel File.
- Click Import, please note the status of import.
- Titles will be imported into the cart you selected.

## Checking discount price and availability:

- After you have done a search, you can click on the title to display additional information about the item. To the right of the general title information, you will be able to see the inventory status of your primary and if established, secondary warehouses. You will see how many copies of the title we have On Hand, On Order and what the demand has been for this title in the past 30 days.
- You can also access real time inventory by clicking the Real Time Inventory link. You will see up-to-the-minute inventory of this title and your estimated discounted price with Baker & Taylor.
- You can also see List Price and total estimated discounted price for the items in your cart under the Cart Summary Header at the top of the page.

## Ordering:

- From the cart function pull down menu, select the Order function.
- You can add Special Instructions for your cart upon order by selecting the View/Edit function from the pull down menu.
- Please keep in mind that if you include any Special Instructions, it will result in the order going into a temporary hold status and will prevent a title by title confirmation from being received.
- Click on the Carts Tab. Select the cart you would like to order.
- Once you have selected to Order the cart, your cart will go from Build Status to Pending status.
- Approximately 5 to 15 minutes after your order is placed it will be in confirmed status. View the confirmed cart on the carts screen by changing the filter by box from Build status to Confirmed status.
- You can view the status of each item (Backordered, Cancelled or Confirmed) by clicking on the name of the cart to display the titles.
- From the Homepage of TS3, under Quick Links, you can access your recent orders by selecting Recent Orders. This will direct you to the Online Customer Support webpage. From here you can view and print invoices, recent orders and statements. If you are not able to access Online Customer Support, Please contact your Sales Representative.

## Preferences:

- Users may want to personalize their viewing preferences. You can come back at any time and change these settings.
  - General Preferences: This preferences page allows you to customize your timeout period, number of search queries saved in search history and your landing page. If you would like to change your landing page, please see Changing your Landing page instructions on the first page of this guide.
  - System Preferences: This shows you the level of access you have within TS3. These preferences cannot be edited. They are built by Product Support when you migrate to TS3.

# B&T Academic Title Source 3 Cheat Sheet

- Search Preferences: These preferences allow you to customize your search criteria for a given product type. You can customize the number of search fields you utilize and the type of criteria you use. Select Submit if you make any changes on this page.
- Display Preferences: This page allows you to customize how your search results are displayed. You can customize your view of search results to be brief view (Single Line) or Extended View (Multi Line). Customize your Result Sort default, and the number of search results displayed. For slower internet access, limit the number of search results displayed.
- Cart Preferences: This function allows you to customize your Carts. You can customize how titles in your cart are sorted. Here you can see your discount plan associated with a cart and the account number. Default Duplicate allows you to select what profile you would like to use for a duplicate check against all carts or just some carts. Please note your Title Source 3 Administrator will set up your duplicate check profiles.
- Grid Preferences: For an additional charge, Customers can be set up with grid functionality. This is where you would edit those preferences. Please contact Electronic Distribution at [edist@btol.com](mailto:edist@btol.com) if you would like to establish grid preferences for your Title Source 3 subscription.

## Contact Us:

- Title Source 3 is a work in progress and we would appreciate any feedback or questions and concerns you may have regarding the new system.
- Please select the Contact Us Tab at the top of the page on the right hand side. You can access phone numbers to contact B&T here as well.

## Important Contacts:

### Product Support

Phone: (US & Canada) 800-775-3700 x9

Phone: (International) 908-541-7062

Fax: 908-541-7852

Email: [electser@btol.com](mailto:electser@btol.com)

### Customer Service - Books

Eastern Service Ctr - Somerville, NJ

Ph: 800-775-1500

Fax: 908-774-1600

Southern Service Ctr - Commerce, GA

Ph: 800-775-1200

Fax: 908-775-1300

### Customer Service - Audio/Video

All Government & Int'l Accounts

Phone: 800-775-2600

Eastern States: AL, AR, CT, DC, DE, FL, GA, IL, IN, KY, MA, MD, ME, MI, MS, NC, NH, NJ, NY, OH, PA, RI, VT, SC, TN, VA, WI, WV

Phone: 800-775-2600

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