Grids Setup

> **IMPORTANT!**
>
> Grid codes (branches and funds) must **EXACTLY** match your codes in Evergreen, otherwise they will not be populated when you do your cart uploads into Acquisitions.

Notes:

- Branch names should follow your PINES branch codes, e.g. LOPL-SW or WGRL-BO
- Fund names in grids should follow your fund <u>codes</u> in Acq, not fund <u>names</u>
- There is a 26 character cap on fund codes in TS360, so name your funds accordingly
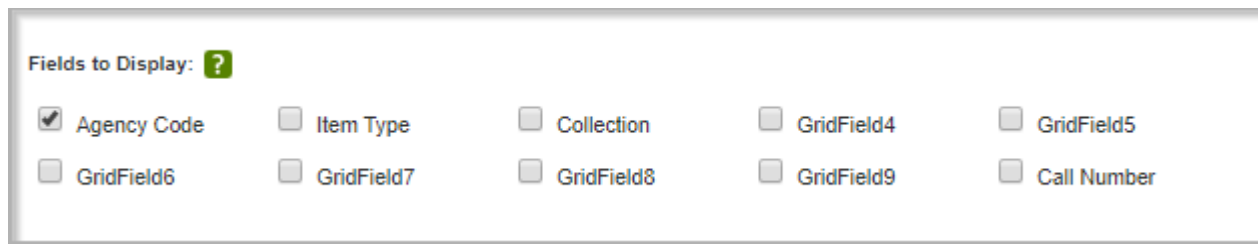
Baker & Taylor

Setting Up Branch Grid Codes

1. Log in to TS360 with the Admin login.

2. Choose **Admin > Grid Codes.**

3. If you have multiple users creating carts, you will need to decide if all users should be able to assign all grid codes, or if each user will need to have only some grid codes available to them.

> If you want to specify which grid codes are available to which users, this is accessed via **Admin > Users**, clicking on the users's name, and clicking the **Grid Fields** tab to select which grid codes the users should be able to access.

4. You will see several checkboxes called "Fields to Display." Since we are creating branch grids right now, click the ticky next to "Agency Code."
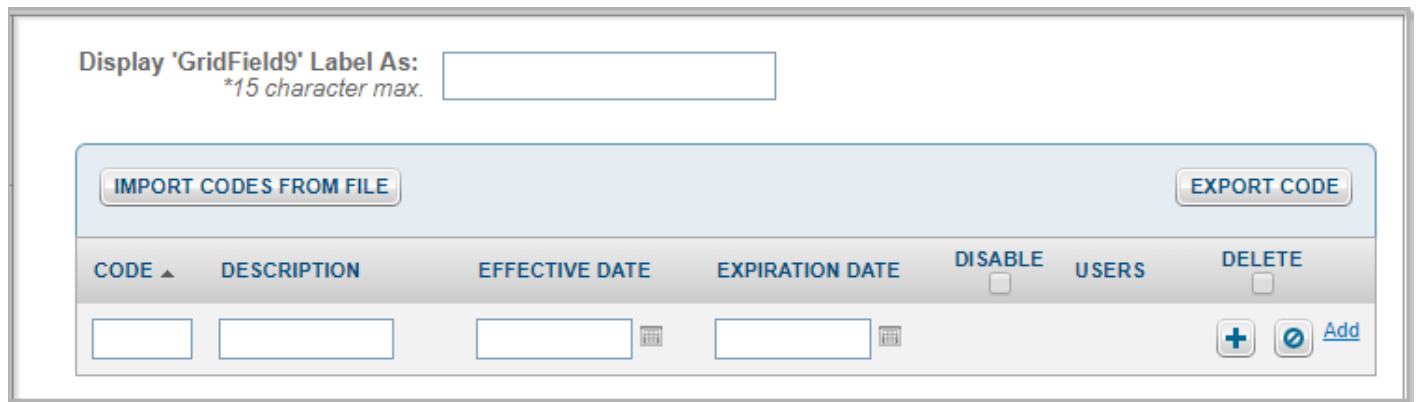

5. Now we will actually add our branch codes.

Display Agency Code Label As: Branch

There are 4 fields available: Code, Description, Effective Date, and Expiration Date. Expiration Date is not necessary except in special circumstances; it is recommended to leave it blank for each line.

6. On the first line, enter your first branch shortname (e.g. ARL-WAT) in the **Code** field.

7. In the **Description** field, enter your branch shortname again.

8. Effective date should be the day that you are creating your codes, so they are immediately available for use.

9. Click the gray plus sign on the right of your line to add your grid code.
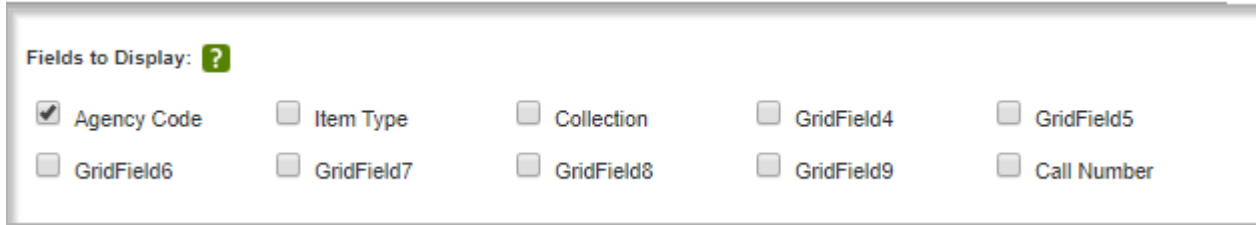
10. Continue adding your branch codes.

11. When all are completed, click the orange Save button.

Setting Up Fund Grid Codes

Baker & Taylor offers a batch import option to import your funds en masse. This is useful if you have many fund codes. Instructions are below in **Batch Add Fund Codes**.

To add codes individually, follow the instructions here. This is appropriate if you only have a few fund codes or are testing.

1. Open TS360.

2. Navigate to **Admin > Grid Codes.**

3. If you are not currently using any fund codes, click one of the "Fields to Display" that is not currently in use.

4. Enter "Fund" in the **Display GridField Label As** field.

5. On the first line, enter your fund code **EXACTLY** as it is in Evergreen. Do not include the fund year. So it might look like ADULT-TIFT-BOOK, but WOULD NOT look like ADULT-TIFT-BOOK (2019). If they do not match Evergreen, they will not be populated when you do your Acquisitions uploads.

6. Click the gray plus sign to the right of your line to add your grid code.

7. Continue adding grid codes.

8. When all are completed, click the orange Save button.

Batch Add Fund Codes

> Be aware that the batch import in TS360 will add fund codes to anything that already exists. If you were previously using fund codes, you will either need to delete/inactivate them and then batch import your new codes; or manually modify them to match your new Acquisitions fund codes.

1. Run the report "List of funds with parameters" found in **Reports > Shared Templates > PINESacqadmin > Year End Reports**.

2. Delete all columns in the report results spreadsheet except for the column for Fund Code.

3. Open TS360.

4. Go to **Admin > Grid Codes.**

5. If you are not currently using any fund codes, click one of the "Fields to Display" that is not currently in use.

6. Enter "Fund" in the **Display GridField Label As** field.

7. Click the gray **Import Codes from File** button.

8. This will provide you a list of the way that your upload file is formatted. Since your Notepad file has only the fund codes, you will use the **Code Only** option. So in your list of resulting grids, only the code field will be populated.

9. Make sure that "Header Row Included" is checked, unless you removed the header row in your spreadsheet.

10. Click the gray Choose File button and navigate to where your text file of grid codes is.

11. Click the orange Import button. This will import and populate your fund grid codes, and return you to the list of your fund grid codes.
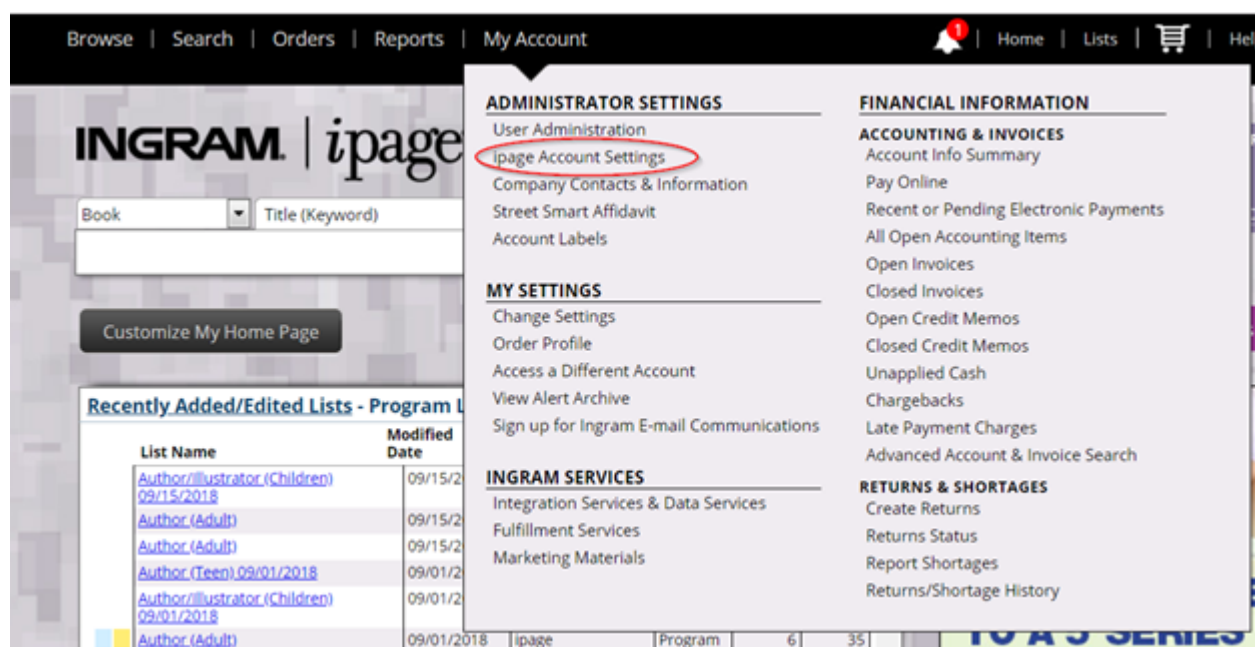
12. Click the orange Save button at the bottom to save your work.

Ingram

Adding Grid Codes

You must log in to iPage with your organization's admin account to make these changes.

1. Log in to iPage.

2. From the **My Account** menu, choose **Administrator Settings > iPage Account Settings**.

3. Selected Acquisitions Vendor should be "Other."

4. Click **Marc Setup**

5. This opens the "Add Data Mapping" area. On the first line, it should be set up as:

- Tag #: 962
- Subfield: b

- Data Element: Branch

6. Click **Add** on the far right to save this.

7. To enter information for funds (if using), change the data to:

- Tag #: 962
- Subfield: f
- Data Element: Fund

8. Click **Add**.

9. Once you've added one or both of these fields, scroll down to the list of data mappings. Find your first field, e.g. "branch". Click the button for **Add/Edit Values**.

260	c	Pub Date		☐		YYYYMMdd ▾
520	a	Annotation		☐		
962	b	Branch		☐	Add/Edit Values　Edit Mapping　Delete	
962	f	Fund		☐	Add/Edit Values　Edit Mapping　Delete	
962	p	Discount Price		☐	Edit Mapping　Delete	
962	q	Copies (Total Quantity)		☐	Edit Mapping　Delete	

Simple Grid (optional)
You may choose up to three 900 level fields below to be used when applying a Simple Grid to a title on a Selection List. The Simple Grid option will appear on the Product Detail page when editing a title from a Selection List provided you specify the fields you want to include in Simple Grid below.

10. A little bit down the page will be a large box where you can copy and paste all of your branch/fund codes from Evergreen.

Add Multiple Values

⚠️ Branch and fund codes must **exactly** match Evergreen or your uploads will not work. Branches must be in the shortname format, like ARL-WAT. Funds must use the fund <u>code</u> not fund name.
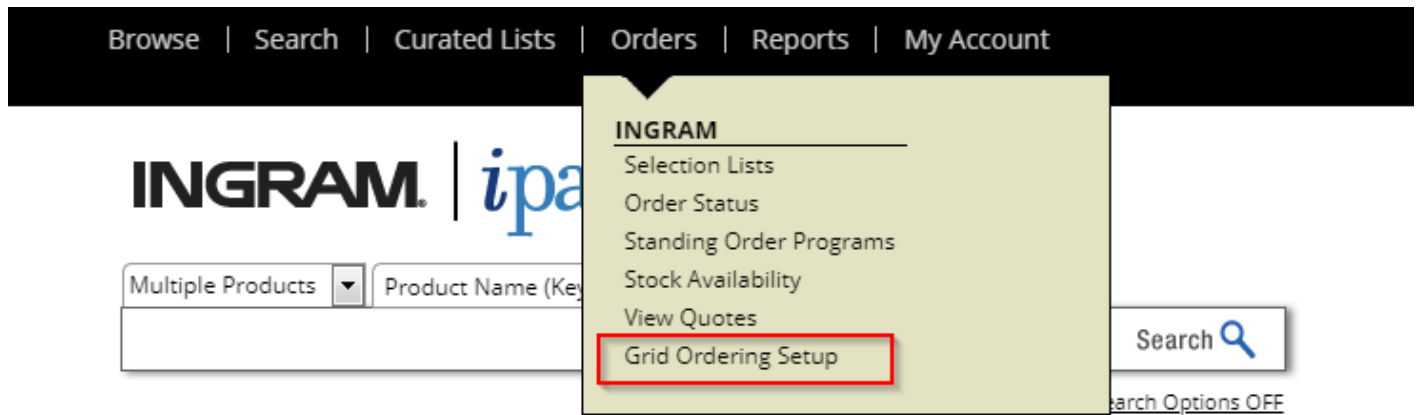
If you are adding fund codes, I **highly** recommend to run this report before doing this step: Shared Templates>PINESacqadmin>Funds>List of funds with parameters.

Open the report in Excel, and then you can select and copy the column for Fund Codes and paste it directly into this box in iPage. Make sure not to leave a hanging comma or space at the end of your last fund code!

11. Once you've entered your branch/fund codes, click **Complete** on the far bottom right.

Adding Grid Options to Templates

You've now entered all of your branch/fund codes, but you now need to enable them in your grid templates. To do this, go to **Orders > Grid Ordering Setup**.

If you have existing templates If you have and use existing templates, you will need to enable your new grid codes (like fund).

1. For the template you need to edit, click the **Edit** button on the far right for that template.

2. A pop-up will appear. If you already had branch as an option and have just added fund, you'll see that Branch is checked and Fund is not. Make sure both are checked, and then click **Continue**.

3. In the middle of the page you'll see the branches that you've previously set up for this grid template.

> ⚠️ If you just want Fund to be available in grids, you can go ahead and click **Complete**. Only proceed further if you want to actually hard-bake in fund codes to be applied when you apply templates.

4. Select the fund codes that you'd like to add for each branch for this template.

5. When you're done with your changes, click **Save** and then **Complete.**

> 📝 The changes that you've made to your templates will **not** affect lists that you've previously used those templates on. Only new lists will use new fields that you've added.

Midwest

Branch and fund codes are set up by Midwest staff, and will be created by Midwest when you're doing your setup.