Grids Setup

<fc #ff0000>**IMPORTANT!**</fc>

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 codes in Acq, not fund names
- There is a 26 character cap on fund codes in TS360, so name your funds accordingly

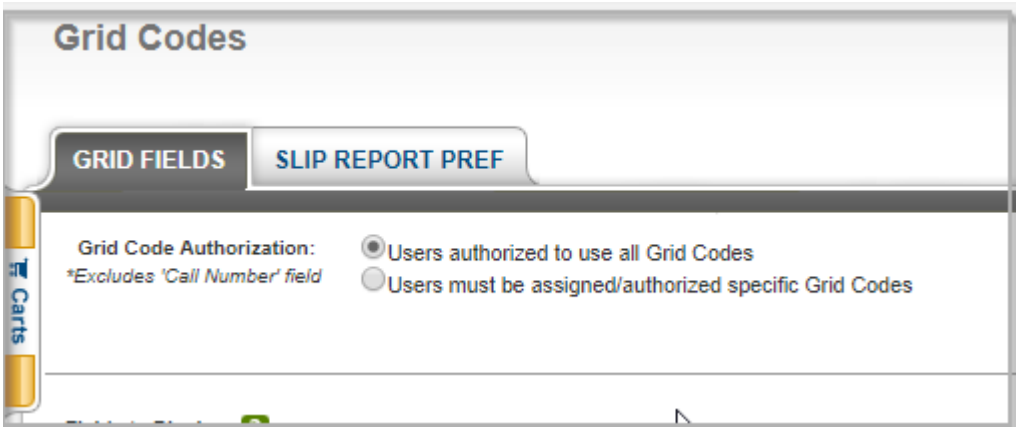
Baker & Taylor

Setting Up Branch Grid Codes

1. Log in to TS360 with the Admin login.

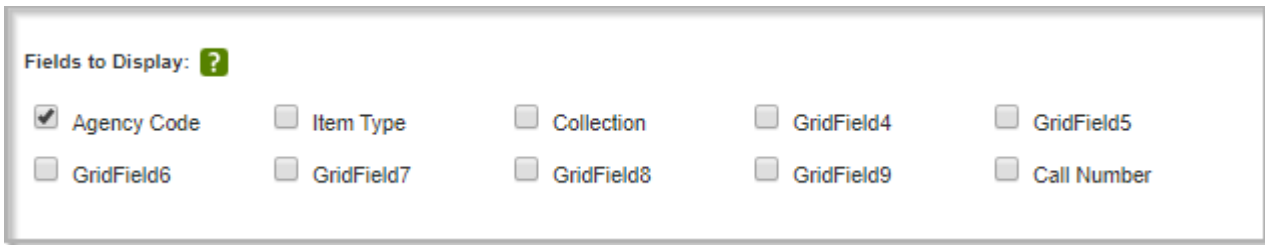
2. Choose **Admin > Grid Codes.**

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.

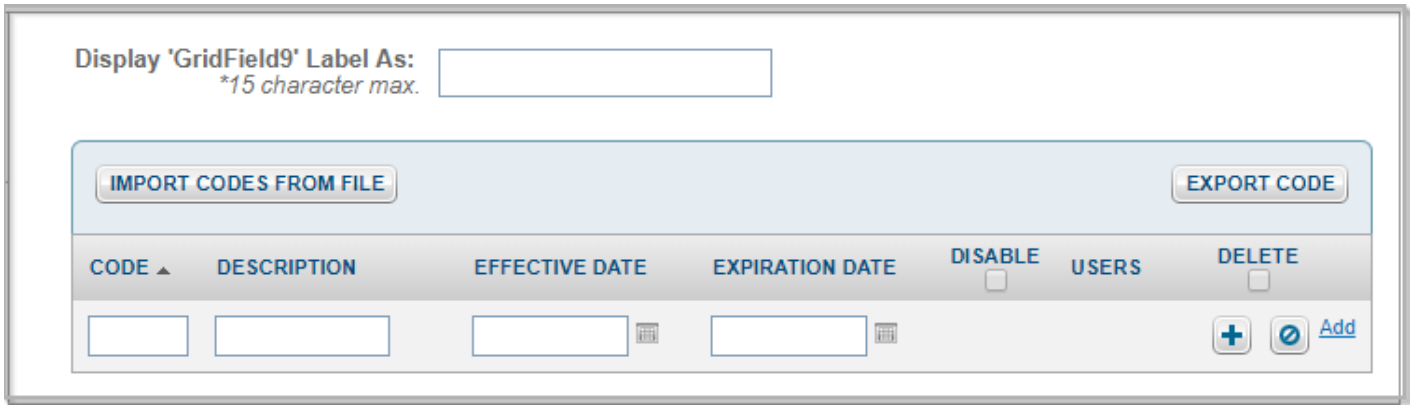


If you want to specify which grid codes are available to which users, this is accessed via **Admin > Users**, clicking on the users's name, and clicking the **Grid Fields** tab to select which grid codes the users should be able to access.

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.

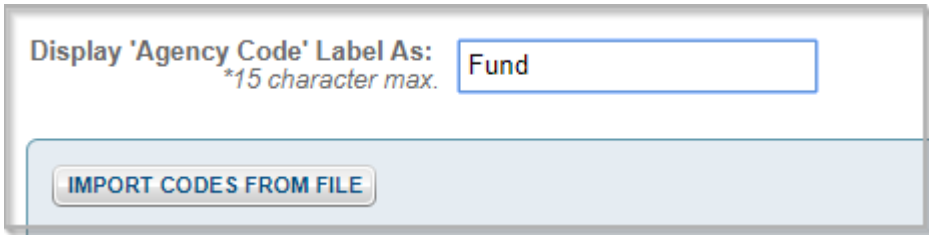
4. Go to **Admin > Grid Codes.**

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

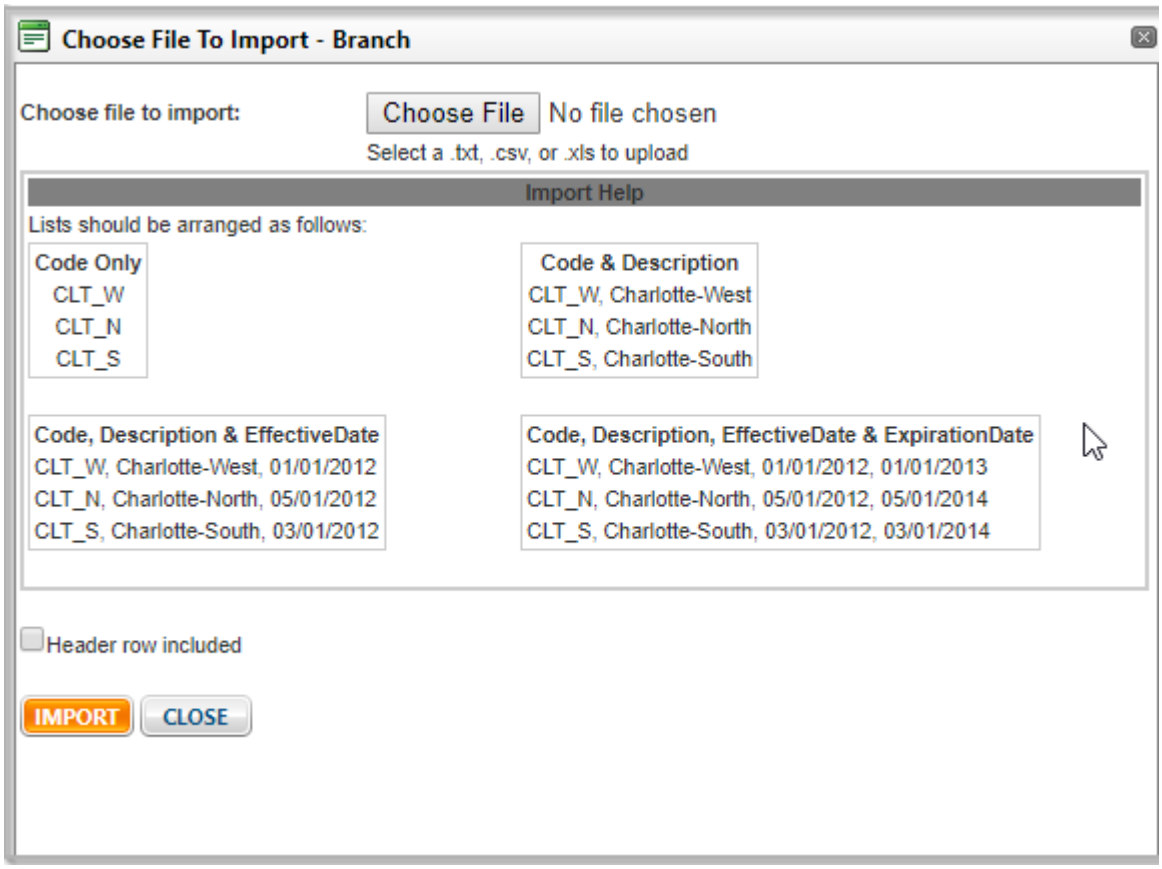


6. Enter “Fund” in the **Display GridField Label As** field.

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.

Midwest

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

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Last update: **2020/07/06 17:30**