MARC Downloads

If you are importing MARC records from vendors, you will need to have your holdings subfields set up. Much of this work may be done by the PINES Acquisitions Specialist, but there are a few areas where you will need to set up this information.

Grids Info

IMPORTANT! Branch codes must EXACTLY match your PINES org unit names, e.g. LOPL-BULL or CRLS-DAW.

If you have existing branch codes in your vendor's website, they must be modified to match your PINES branch names.

<fc #ff0000>**Your branch codes WILL NOT be imported into Evergreen if they do not exactly match your PINES org unit names.**</fc>

Fund Codes

If you choose to assign fund codes in your vendor's website, they must EXACTLY match your fund **codes** in Evergreen. Similarly to branch codes, if you have existing fund codes in your vendor's website, they must be modified to match your PINES fund codes.

<fc #ff0000>**Your fund codes WILL NOT be imported into Evergreen if they do not exactly match your fund CODES (not names) in PINES.**</fc>

Your existing PINES fund codes can be extracted in a report. It is located in **Reports→Shared Templates→PINESacqadmin→Funds**→"List of funds with parameters." The fund codes can then be copy and pasted into a text file to be used for batch import into a vendor site.

Baker & Taylor
Baker & Taylor offers a batch import option to import your fund codes en masse. Instructions are found here: Batch import fund codes into TS360.

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.

Baker & Taylor

Baker & Taylor calls these “Custom MARC profiles.” There may or may not be a charge for this service; contact your vendor representative to check.

Pre-requisitites for using MARC Profiles:

- You must have set up a provider in Evergreen for each of your active Baker & Taylor accounts
- 962 holdings information must be entered by PINES for each provider profile
- [If using branches in grids] You must have set up branch names already in **TS360 Admin > Grid Codes**.
- [If using funds in grids] You must have setup fund names in **TS360 Admin > Grid Codes**.

Your fund names and branch names must EXACTLY match Evergreen. Branch names should be formatted as DTRL-BLAK not Blakely or BLAK, for example. Fund codes must also exactly match Evergreen.

Creating a MARC Profile

1. Sign in to TS360.

2. Go to **Admin > MARC Profiles**.

If you do not have this option available, check with your Baker & Taylor representative.

3. Click the grey **Create new MARC Profile** button.

4. Create a profile name and click the orange **Save** button to save your profile name. You will notice the green confirmation mess age the top noting that your MARC profile has been created.

No Grids

These instructions are if you are not using grids on TS360, and you are only assigning a quantity in your carts.

1. From within your new MARC Profile, click on the **MARC Bibliographic Rules** tab.

2. You'll notice that they already have one row created for you to fill in. Click in the drop down box and choose **Add**.

3. This opens up new fields for you to start entering information. When not using grids, the only two

subfields you need are **net price** and **quantity.**

4. To enter for QUANTITY:

- Change **Grid field** to **TS360 Data**
- Change **Branch** to **Order Quantity**
- In the **Tag** field, enter “962” and in the **Subfield** enter “q” (lowercase)

5. To enter for NET PRICE:

- Click **Add New Tag Rule** to create a new row
- On the new line, click **Select** and choose **Add**. This populates some default info just like before.
- Change **Grid Field** to **TS360 Data**
- Change **Branch** to **Net Price**
- In the **Tag** field, enter “962” and in the **Subfield** enter “p” (lowercase)

6. Click the orange **Save** button to save your information.

Grids

Once you have created a name for your MARC profile, continue here.

1. Click the **Primary Grid Tag Rules** tab.

2. In the top portion of the page, enter **962** for the MARC Tag for Grid Distribution. Leave all the other fields blank/unchecked.

3. In the bottom half of the page, you will be mapping your grid fields to the subfields in Evergreen. Which ones you choose will depend on which fields you are currently using in your grids.

At a minimum, **Net Price** and **Quantity** are required.

Downloading your cart

1. From within your cart, click the

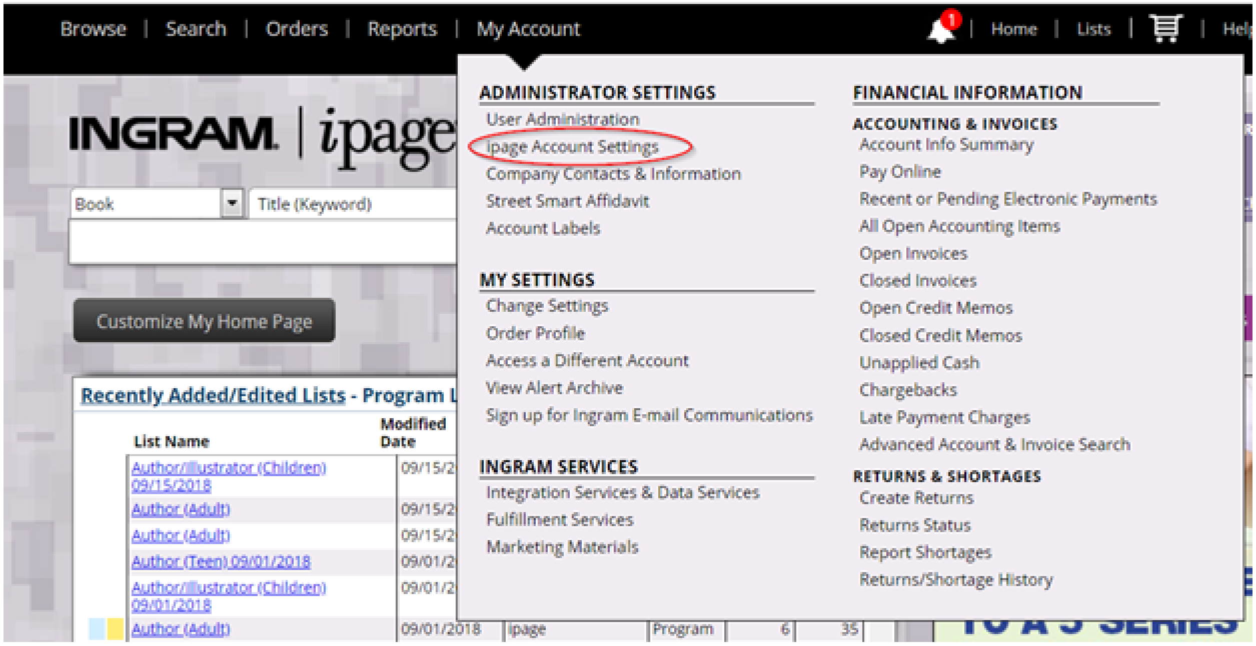
Ingram

MARC setup

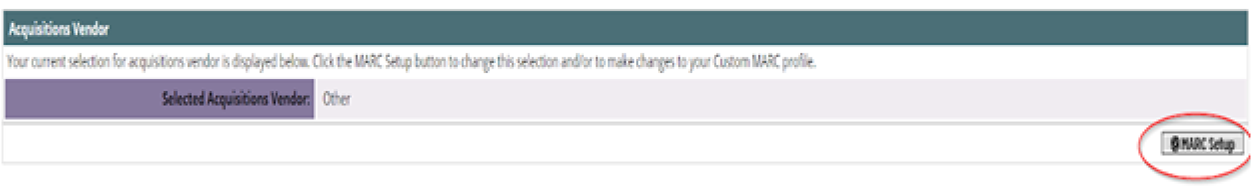
You must log in to iPage with your organization's admin account to make these changes.

1. Log in to iPage.

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



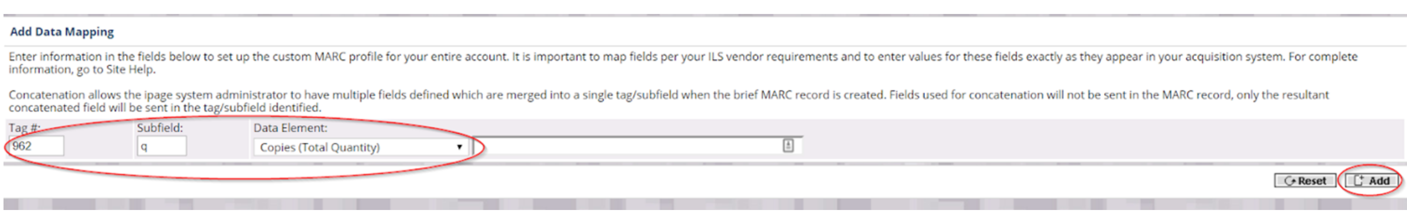
3. Selected Acquisitions Vendor should be "Other."



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: p
- Data Element: Discount Price



6. Click **Add** to add a second line for quantity. This line should be:

- Tag #: 962
- Subfield: q
- Data Element: Copies (Total Quantity)

7. Click **Add** to save your second row.

Downloading your cart

1. Open your cart.

2. Click the green **Price this list** button.

3. Once the list is done processing the discount prices, click the gray **Download** button.

4. From the resulting Download Options pop-up, choose **Download and Keep** and **Custom MARC EAN Format**.

5. Click the gray **Download List** button.