

# MARC Downloads Setup

## Baker & Taylor

### Prerequisites for setting up MARC Profile

- You need to have access to this service; if you do not see **Admin > MARC Profiles** in your menu on TS360, contact your rep to get access.
- **If using branches in grids** - You must have **set up branch names** already.
- **If using funds in grids** - You must have **set up fund names** already.

### 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 message at 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.**

If you are assigning branch names or fund codes in TS360, use the instructions for **Gridded Profiles**.

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**.

SEQUENCE	RULES						
1	▼	Add ▼	TS360 Data ▼	Net Price ▼	to Tag	962 Subfield p	Add Condition ✕
2	▲	Add ▼	TS360 Data ▼	Order Quantity ▼	to Tag	962 Subfield q	Add Condition ✕
		-Select- ▼			Tag	Subfield	Add Condition ☹ Clear

[ADD NEW TAG RULE](#)

[SAVE](#) [CANCEL](#)

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. You will also need to have already populated your grid fields via Admin > Grid Codes.

If you are only downloading price and quantity, use the instructions for [Non-Gridded Profiles](#).

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.

**MARC instructions will be executed sequentially**

▼MARC Grid Rules

Export in Innovative Interfaces Millenium Format (Single 960 Tag)

Replace iii List Price (subfield "s") with Discount Price

Replace iii Location Code (subfield "l") with  ▼

Replace iii Fund Code (subfield "u") with  ▼

MARC Tag for Grid Distribution   Indicator for Grid Distribution

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.

To enter for QUANTITY:

- Start on the first pre-populated row OR delete the row and click **Add New Tag Rule** to start fresh
- Change **Select** in the first field to **Add**
- Second column should be **Grid Field**
- Third column should be **Grid Qty**
- In the "to Subfield []" blank, enter "q" (lowercase)

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 "to Subfield []" blank, enter "p" (lowercase)

To enter for BRANCHES:

- Click **Add New Tag Rule** to create a new row
- On the new line, click **Select** and choose **Add**. This populates some default info.
- The second column should say **Grid Field**.
- Change the third column to **Branch**.
- In the "to Subfield []" blank, enter "b" (lowercase)

To enter for FUNDS:

- Click **Add New Tag Rule** to create a new row
- On the new line, click **Select** and choose **Add**. This will populate some default info.
- The second column should say **Grid Field**.
- Change the third column to **Fund**.
- In the "to Subfield []" blank, enter "f" (lowercase)

SEQUENCE	RULES					
1	▼	Add ▼	Grid Field ▼	Branch ▼	to Subfield b	Add Condition X
2	▲ ▼	Add ▼	Grid Field ▼	Grid Qty ▼	to Subfield q	Add Condition X
3	▲	Add ▼	TS360 Data ▼	Net Price ▼	to Subfield p	Add Condition X

Click the orange **Save** button to save your work.

## Ingram

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**.

The screenshot shows the Ingram iPage Administrator Settings menu. The 'iPage Account Settings' option is circled in red. The menu is divided into several sections:

- ADMINISTRATOR SETTINGS**
  - User Administration
  - iPage Account Settings** (circled in red)
  - Company Contacts & Information
  - Street Smart Affidavit
  - Account Labels
- MY SETTINGS**
  - Change Settings
  - Order Profile
  - Access a Different Account
  - View Alert Archive
  - Sign up for Ingram E-mail Communications
- INGRAM SERVICES**
  - Integration Services & Data Services
  - Fulfillment Services
  - Marketing Materials
- FINANCIAL INFORMATION**
  - ACCOUNTING & INVOICES**
    - Account Info Summary
    - Pay Online
    - Recent or Pending Electronic Payments
    - All Open Accounting Items
    - Open Invoices
    - Closed Invoices
    - Open Credit Memos
    - Closed Credit Memos
    - Unapplied Cash
    - Chargebacks
    - Late Payment Charges
    - Advanced Account & Invoice Search
  - RETURNS & SHORTAGES**
    - Create Returns
    - Returns Status
    - Report Shortages
    - Returns/Shortage History

3. Selected Acquisitions Vendor should be "Other."

The screenshot shows the Acquisitions Vendor selection screen. The 'Selected Acquisitions Vendor' is set to 'Other'. The 'MARC Setup' button is circled in red.

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

**Add Data Mapping**

Enter information in the fields below to set up the custom MARC profile for your entire account. It is important to map fields per your ILS vendor requirements and to enter values for these fields exactly as they appear in your acquisition system. For complete information, go to Site Help.

Concatenation allows the ipage system administrator to have multiple fields defined which are merged into a single tag/subfield when the brief MARC record is created. Fields used for concatenation will not be sent in the MARC record, only the resultant concatenated field will be sent in the tag/subfield identified.

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

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.

## Midwest

Midwest sets up the majority of your MARC download settings when doing your EDI account setup. However, there is one setting you need to confirm is **unset**.

1. Log in to Midwest's site at <https://www.midwesttape.com>.
2. Navigate to **Settings > Change Library Settings > Manage Vendor MARC Config**.
3. Most of these attributes will already be set by Midwest. However, you want to confirm that these settings look like the screenshot below:

**Midwest number:** Checked

**useOCLC#ifAvailable:** Unchecked

HOME > SETTINGS > LIBRARY SETTINGS > VENDOR MARC SETUP

Check the boxes next to the tags you'd like included in your vendor MARC records.

**Note:** The tags will be included in your vendor MARC records only if the information currently exists in the database.

TAG	DESCRIPTION	EXTENDED ATTRIBUTE
<input checked="" type="checkbox"/> 1	Midwest number	
1	Midwest number	<input type="checkbox"/> useOCLC#IfAvail
<input checked="" type="checkbox"/> 3	Source	
<input checked="" type="checkbox"/> 5	Current date/time	
<input checked="" type="checkbox"/> 7	Physical Description Fixed Field	
<input checked="" type="checkbox"/> 8	Language	
<input checked="" type="checkbox"/> 10	OCLC control #	
<input checked="" type="checkbox"/> 20	ISBN, price	
20	ISBN, price	<input checked="" type="checkbox"/> useCustomerPrice

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