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.

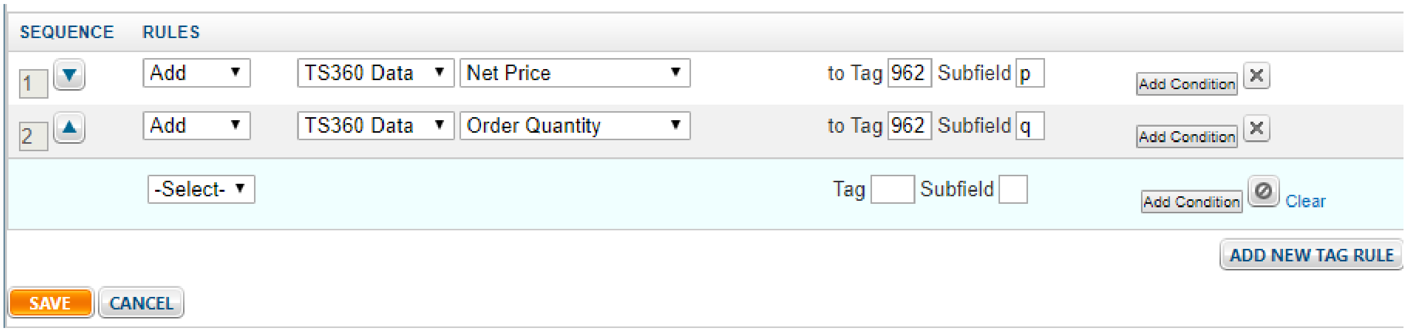
No Grids

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**.



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.

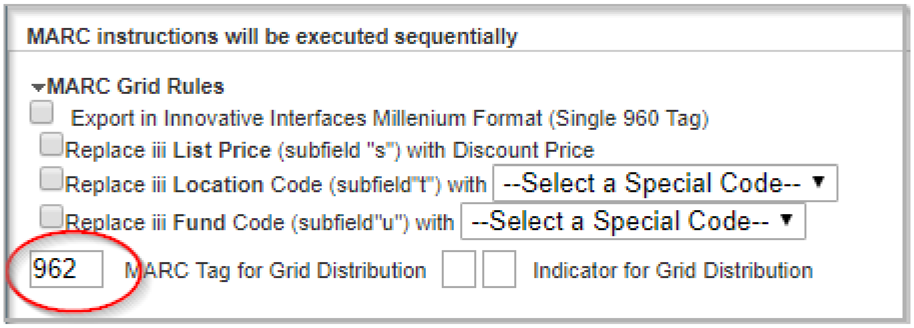
Grids

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.



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:

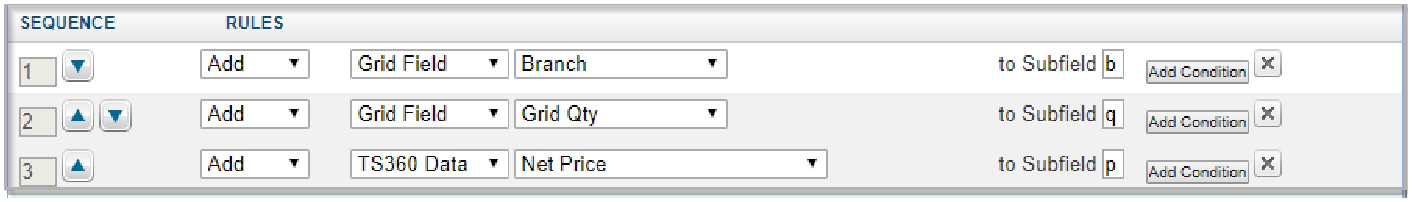
- Click **Add New Tag Rule** to create a new row
- On the new line, click **Select** and choose **Add**. This populates some default info just like before.
- Change **Grid Field** to **TS360 Data**
- Change **Branch** to **Net Price**
- In the "to Subfield []" blank, enter "p" (lowercase)

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)



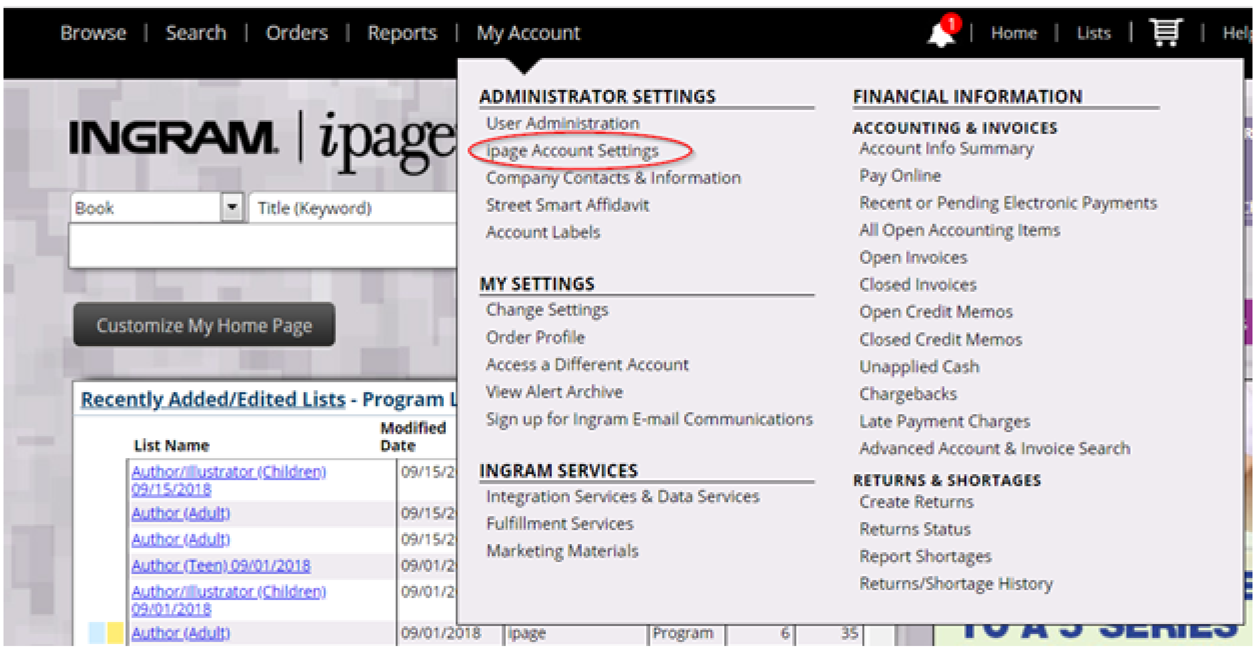
Click the orange **Save** button to save your work.

Ingram

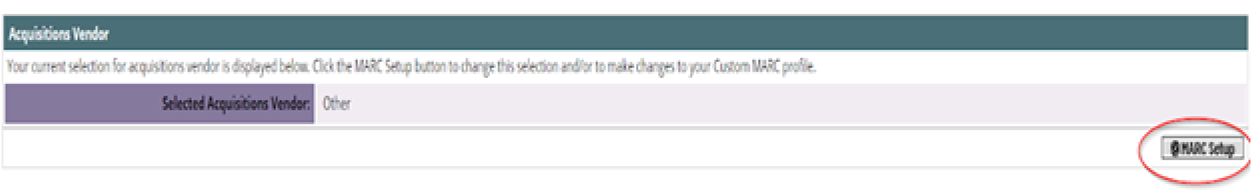
You must log in to iPage with your organization's admin account to make these changes.

1. Log in to iPage.

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



3. Selected Acquisitions Vendor should be “Other.”

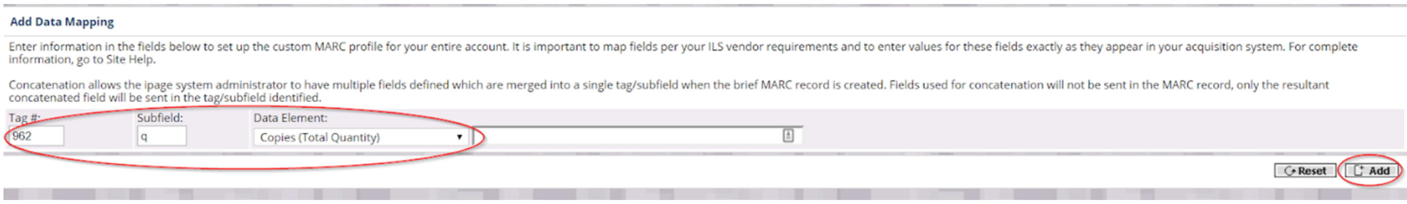


4. Click **Marc Setup**

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.

Midwest

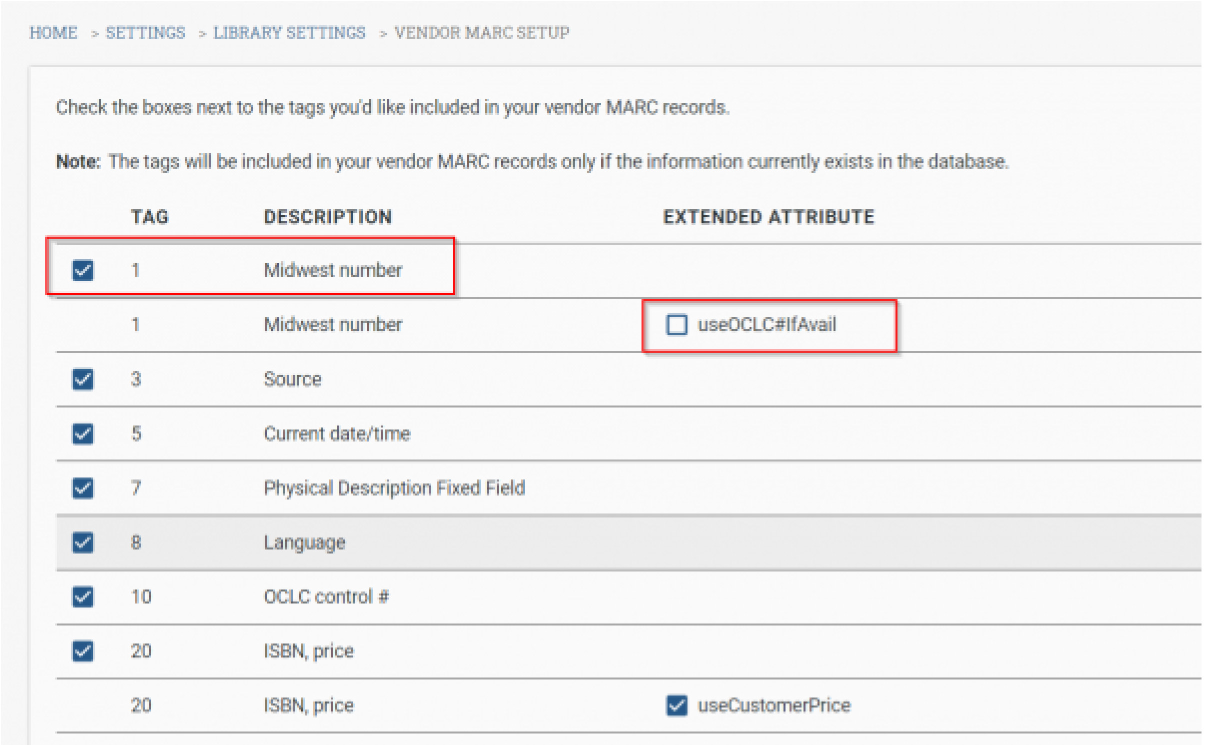
Midwest sets up the majority of your MARC download settings when doing your EDI account setup. However, there is one setting you need to confirm is **unset**.

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



This is extremely important, since if these settings aren't correct then it can block imports and overlays from OCLC via Z39.50.

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https://pines.georgialibraries.org/dokuwiki/ - **PINES Documentation**

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Last update: **2020/11/30 09:52**