



## Instructions for Using Baker & Taylor Title Source 3

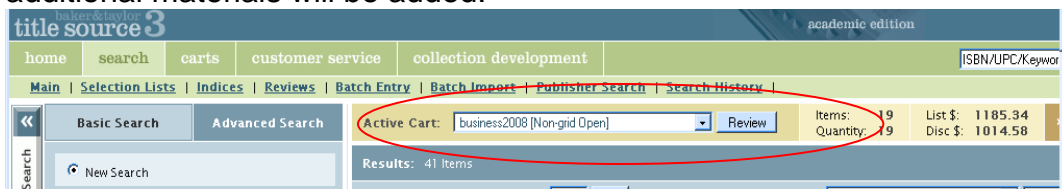
### Log-in

Baker & Taylor (B&T) Title Source 3 is a commercial web site that may be used by library staff for requesting books. Title Source 3 is available at: <http://academiclibrary.btol.com/> To login, enter your B&T User ID and password. If you do not know your B&T ID and password contact the Acquisitions Assistant for help.

**IMPORTANT:** When logging in, if you get a message indicating that someone is already logged into the system, please try again later. Otherwise, you will disconnect that current user from the system. At present it is necessary to share IDs and passwords.

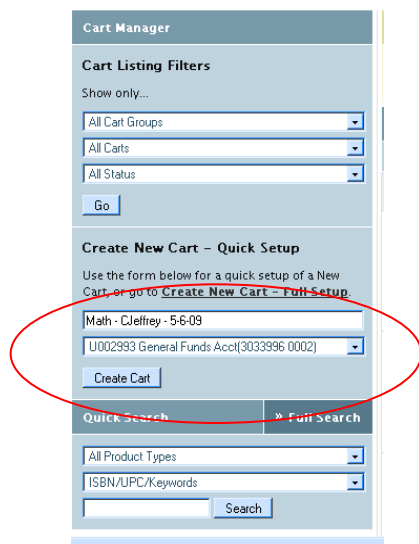
### Selecting and Creating Carts

Before beginning to search for materials, make sure that the appropriate cart is listed in the "Active Cart" drop down menu. If it is not, select the cart to which additional materials will be added.



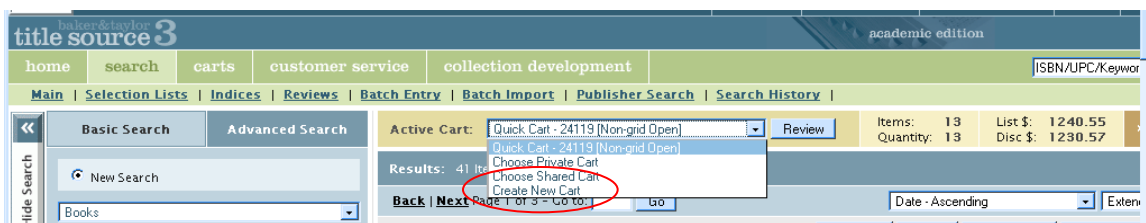
If it is necessary to create a new cart, select the <carts> tab at the top of the screen.





Under <Create New Cart> it is possible to use the quick setup feature to create a cart. This will allow the user to name the cart and select the appropriate account. The cart name should include the department, the name of the person building the cart and the date that the cart was created, e.g. Math – Cjeffrey - 5-6-2009. For books ordered from the Library’s regular materials budget, the account should be set to “General Funds Acct”. Select the <Create Cart> button when ready to proceed.

It is also possible to create a cart from the search screen. From the <Active Cart> list select <Create New Cart>. This method is not preferred because it is more likely that the user will forget to select or create a cart and materials could be inadvertently added to the wrong cart.



## Search

To begin searching, select the <search> tab.



Once you are in the main search screen you will see the various search criteria. You can change each line to the same search criteria or use different ones. Also remember to change your operands (AND, OR) to the correct one depending on your search criteria.

You can search for a book by several methods:

- Keywords in the title

- Keywords in all fields – this is a broad search
- Author
- Keywords in the author
- Subject – this method will give you a broad list of all books available on the subject
- ISBN

You can also combine searches:

- Keywords in the Title and Author OR
- Author and Subject – to see a list of all books by a particular author on a subject

## Setting Filters

Before executing the search you should set filters to eliminate certain types of materials. Always use the following settings:

Publication Status – Exclude (mark the following to exclude):

- Out of Print
- Publisher Out of Stock Indefinitely
- Publisher Out of Stock
- Unable to Locate Publisher
- Publisher Out of Business
- Publication Cancelled

None of the above categories of materials are appropriate for Clayton's general collection development purposes. These items are difficult to obtain. Only when specific requests for such materials are made by members of the teaching faculty will an attempt be made to locate titles that fall into these categories.

The screenshot displays a library search interface. On the left, the 'Search Filters' section is expanded, showing a list of filters under the heading 'Publication Status - EXCLUDE'. The following filters are checked:

- Out of Print
- Publisher Out of Stock Indefinitely
- Not Yet Published
- Publisher Out of Stock
- Unable to Locate Publisher
- Publisher Out of Business
- Publication Cancelled

Other filter categories visible include 'Physical Format', 'Book Classification', 'Language', and 'B&T Books Stock Status'. The main search results area on the right shows a list of books and articles, including 'How to Talk to Moms' by Greven, Alec; Accedera, Kei (ILT) and '40 More Years' by Carville, James; Buckwalter-Poza, Rebecca (CON). The interface also includes a search bar, a 'Basic Search' tab, and a 'Physical Format' section.

In addition, it will be helpful to select the following characteristics:

Publication Date – Before (a date 6 months out)

Example: if today is April 15, 2009, the publication should be scheduled before October 15, 2009 or 20091015

Binding – Hardcover

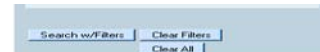
Product Type – Book

Language – English

The screenshot shows a search filter interface with several sections. The 'Physical Format' section has 'Books' selected, and 'Hardcover' is checked. The 'Language' section has 'English' checked. The 'Publication Date' section has 'Before: 20091015' selected. The right side of the interface shows search results for '40 More Years' by James Carville, with a 'Spotlight Title' and a list of related titles.

The screenshot shows a search menu with a 'Basic Search' tab selected. The 'Search' button is circled in red, and the 'Clear Search' button is also circled in red. The 'Search with Filters' button is crossed out with a red X.

Once the filters have been set, a search can be executed. Click on the <Search w/Filters> button at the bottom of the search menu.



Using the <Search> button in the middle of the menu will execute the search without the filters.

Results will be displayed on the right. To retrieve additional information about a particular title, click on that title and the next screen will give more information about that item. To return to the previous screen, click on the <Back to List> button in the upper right side of the screen. To clear the previous search criteria, click on the <Clear Search> button. Filters will remain in effect unless <Clear Filters> is selected.

## Load a Cart

On the main search screen, enter the search criteria. As results are retrieved, items may be added to the cart. Before adding an item to a cart the user should search the on-line catalog for duplicates. An ISBN search can be initiated from Title Source 3 by clicking the <ISBN Lookup> links. The online catalog should also be checked by title. In addition, it is important to check B&T for duplicates that may have been ordered recently and are not yet in the online catalog. This can be done by selecting the <Duplicate Check> link. **All librarians must check to determine whether a title is already owned or on order before submitting the item for purchase.**

#3 **A Farewell to Arms** (Prebind) » Alternate Formats by Hemingway, Ernest **\$23.15 (USD)**  
Est Disc \$ 19.68

General Title Info	
ISBN:	9780812452945
ISBN-10:	0812452941
Publish Status:	
Publish Date:	1987/09/01
Street Date:	
Publisher:	Perfection Learning Prebound
Edition/Vol:	
Dewey:	813/.52
Audience:	

Ordering Info	
PO Per Line:	Qty: <input type="text"/>
<input type="button" value="Add"/>	
Note: <input type="text"/>	

Inventory (On Hand/On Order/30 Day Demand) Real-time Inventory  
B&T Midwest / YBP AtoBO 0 0

When ready to add the item to the cart, the quantity (i.e. the number of copies) should be added to the <Qty> box. The user should also add a note specifying which fund code should be charged and giving the name of the faculty member who made the request and the liaison librarian who added the record. Then the <Add> button can be selected.

#3 **A Farewell to Arms** (Prebind) » Alternate Formats by Hemingway, Ernest **\$23.15 (USD)**  
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General Title Info	
ISBN:	9780812452945
ISBN-10:	0812452941
Publish Status:	
Publish Date:	1987/09/01
Street Date:	
Publisher:	Perfection Learning Prebound
Edition/Vol:	
Dewey:	813/.52
Audience:	

Ordering Info	
PO Per Line:	Qty: <input type="text" value="1"/>
<input type="button" value="Add"/>	
Note: <input type="text" value="Math - Hunt/Jeffrey"/>	

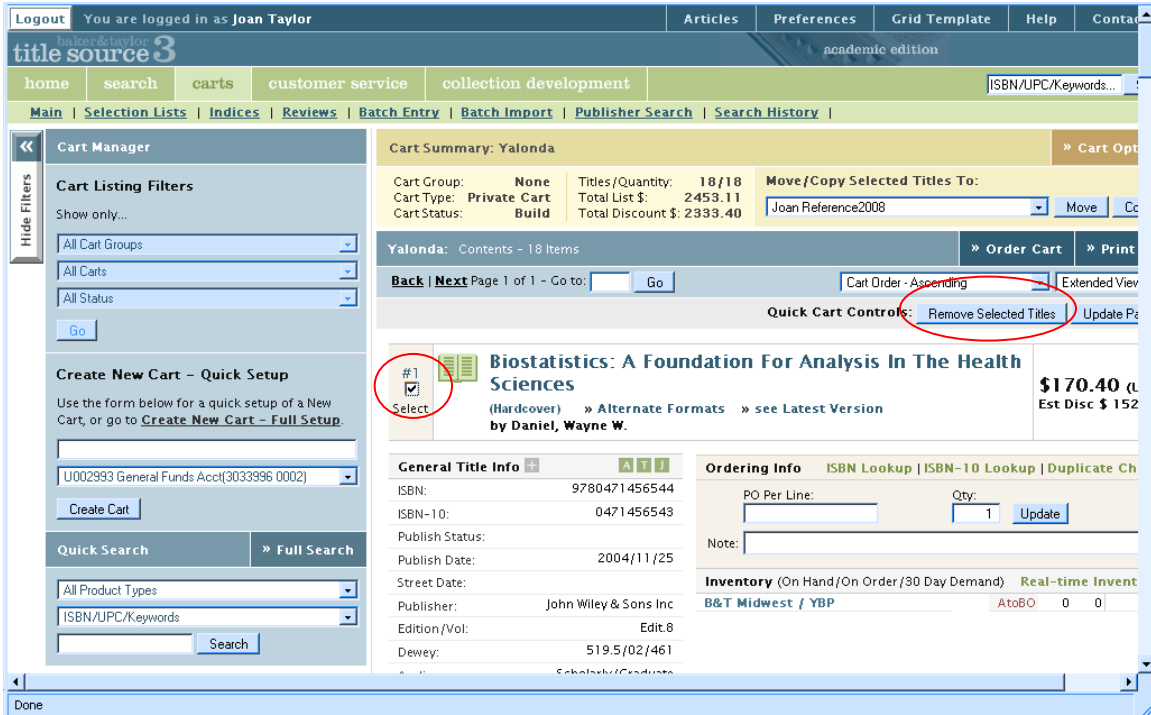
Inventory (On Hand/On Order/30 Day Demand) Real-time Inventory  
B&T Midwest / YBP AtoBO 0 0

The system will keep a running total of items ordered and their cost at the top of the screen. **This feature will help since carts should not be considered complete until at least 25 titles are listed. Carts should not include more than 35 titles.**

Carts will always remain in the BUILD status when used by liaisons. Actual ordering will take place in the Technical Services Department. It is possible to

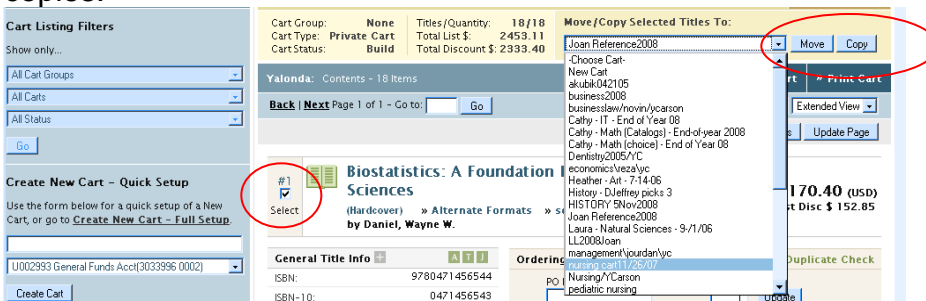
return to an existing cart in a subsequent session by selecting the cart from the <Active Cart> window.

To remove an item from a cart select the box on the left near the item's number. Once all items to be removed have been selected, click the <Remove Selected Titles> button at the top right of the page.



## Moving Items Between Carts

It is possible to move one or more items from an existing cart to another existing cart or into a new cart. To do this select the items that should be moved. Then under <Move/Copy Selected Title> choose the cart to which the item should be moved. Then select the <Move> button. It would be better not to "Copy" titles from one cart to another as that could lead to inadvertently order duplicate copies.



Titles with a PUB STATUS of APPLY DIRECT should be placed/moved into a cart designated for those items. Use both the selector's name and APPLY DIRECT to distinguish this category of cart. These items cannot be purchased from Baker & Taylor. Until librarians are notified that monies are available these items can reside in the cart for future purchase. When funds are available APPLY DIRECT carts can be forwarded to the Director for approval without meeting the minimum title number policy stated above.

## E-mailing and Saving Carts

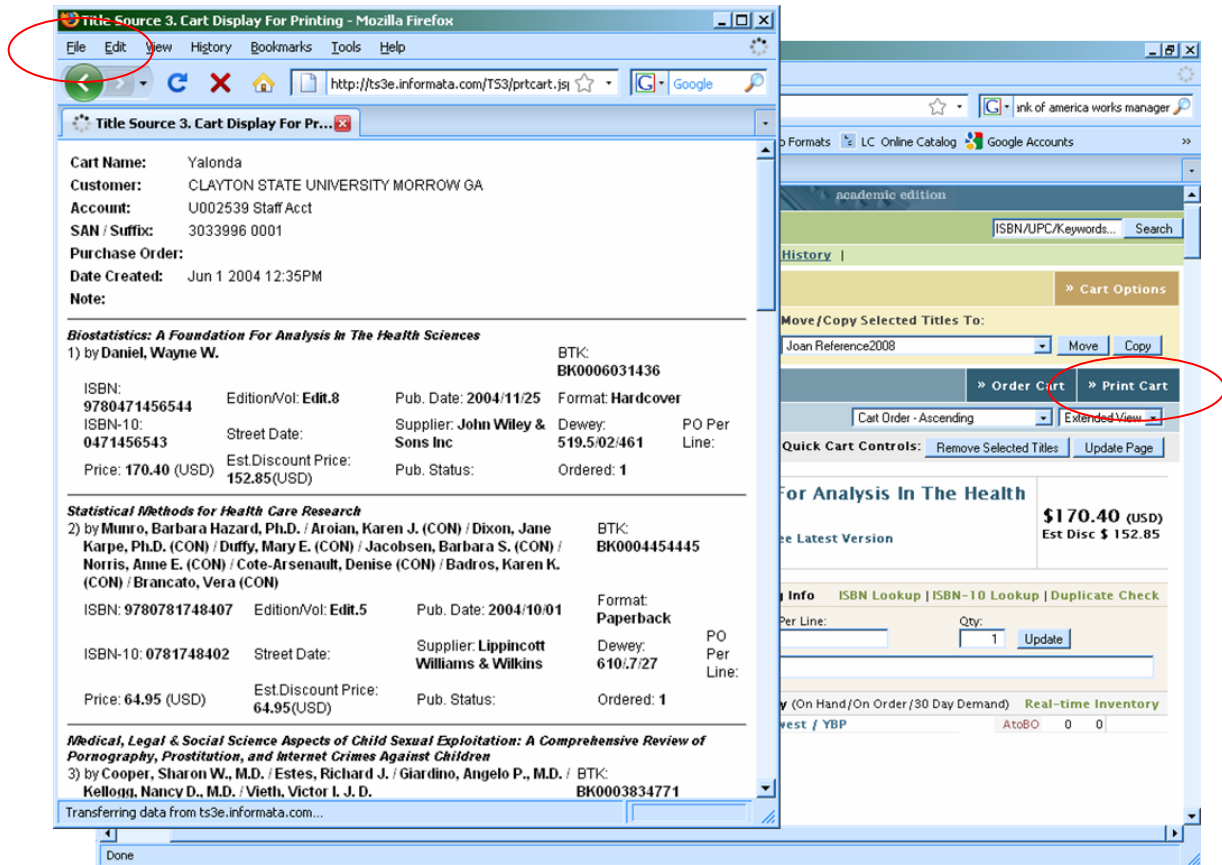
The Liaison can e-mail the cart to him or herself. From the cart list select <e-mail> and then select the <Go> button. Title Source 3 will respond with a form where it is possible to enter an e-mail address. Remember that the e-mail will be "From" the owner of the User ID. Currently that is Joan Taylor. If the liaison would like to e-mail a cart to a faculty member it would be best to e-mail it to him or herself first and then forward to the faculty member so that the faculty member will know who sent the cart.

The screenshot displays the Title Source 3 Cart Manager interface. At the top, it shows the user is logged in as Joan Taylor. The main navigation bar includes options like home, search, carts, customer service, and collection development. The 'Cart Manager' section is active, showing 'Cart Listing Filters' and 'Create New Cart - Quick Setup' options. The 'Cart Listing Summary' indicates 36 carts are listed. Below this is a table of cart listings with columns for Cart Functions, Cart Description, Group, Owner, and Updated. Three carts are visible: #1 Yalonda (18 titles, \$2453.11 list price), #2 Nursing/YCarson (5 titles, \$282.80 list price), and #3 Dentistry2005/YC (19 titles, \$1909.37 list price). A dropdown menu is open for the first cart, with the 'Email' option circled in red.

Cart Functions	Cart Description	Group	Owner	Updated
#1 Select Function... Print Cart Email One-Click Marc Transfer Download Merge	<input type="checkbox"/> Yalonda Status: <b>Build</b> Titles: <b>18</b> Total Qty: <b>18</b> Grid: <b>N</b> Total List \$: <b>2453.11</b> PO#: <b></b> Total Est. \$: <b>2333.40</b> Account: <b>U002539 Staff Acct</b>		BELGWEN	12/09/05
#2 Select Function... Print Cart Email One-Click Marc Transfer Download Merge	<input type="checkbox"/> Nursing/YCarson Status: <b>Build</b> Titles: <b>5</b> Total Qty: <b>5</b> Grid: <b>N</b> Total List \$: <b>282.80</b> PO#: <b></b> Total Est. \$: <b>270.35</b> Account: <b>U002539 Staff Acct</b>		BELGWEN	11/11/05
#3 Select Function... Print Cart Email One-Click Marc Transfer Download Merge	<input type="checkbox"/> Dentistry2005/YC Status: <b>Build</b> Titles: <b>19</b> Total Qty: <b>20</b> Grid: <b>N</b> Total List \$: <b>1909.37</b> PO#: <b></b> Total Est. \$: <b>1809.37</b> Account: <b>U002539 Staff Acct</b>		BELGWEN	01/06/06

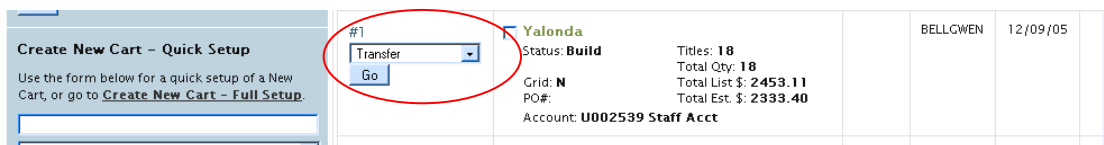
To save the cart as a file select the cart from the carts list. Once the cart is open, select print cart. This will create a document that can be printed. Instead of

printing the document, from the file menu choose <Save Page As> then save the page to the destination of your choice.



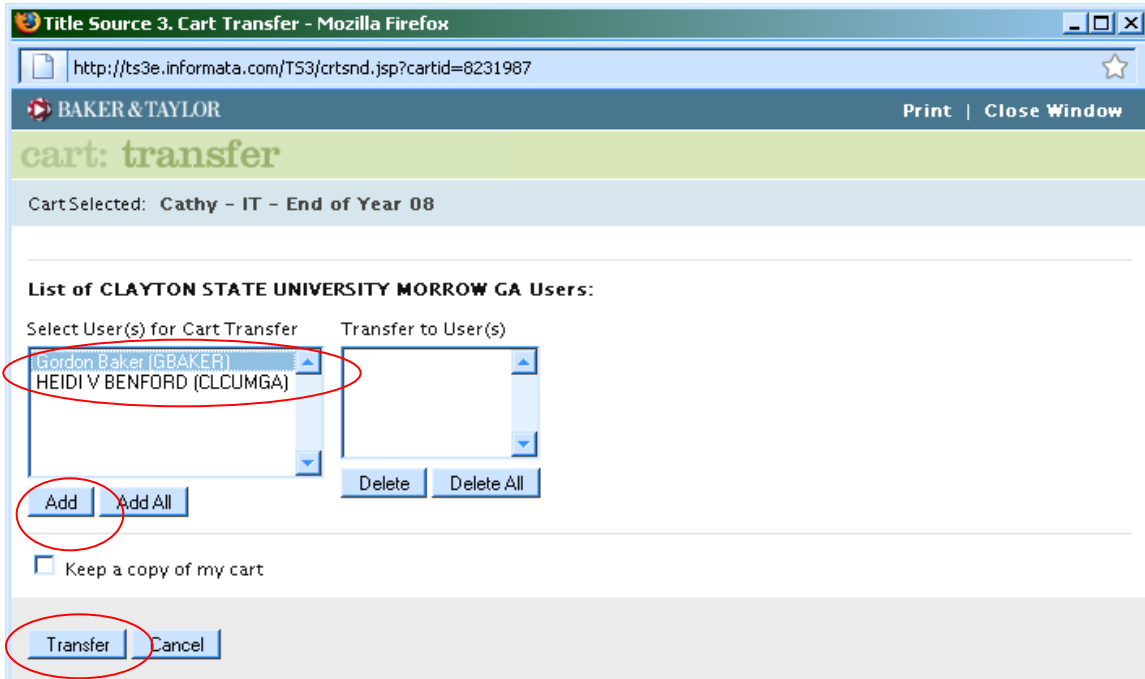
## Transferring a Cart

Once a cart is complete and the liaison has e-mailed or saved as a file any copies that are needed, it should be transferred to the Director for review. To transfer a cart, open the cart list. Locate the cart to be transferred. Select <transfer> from the drop down menu and then select <Go> The Liaison should then e-mail the Director to alert him or her to the fact that a cart has been transferred. The e-mail should include the title of the cart.





The system will respond with a form. Uncheck “Keep a copy of my cart” Doing this will help to prevent duplication. Then select the individual who should receive the cart. Click the <Add> button which will move the name to the <Transfer to> list. When ready select the <Transfer> button at the bottom of the page.



## Logout

To logoff the system, click on the <Logout> button at the top left of the page. It is important to logout so that others will know that it is safe to log in and so that the system will allow the user to return without wait for the system to time out.



## Review

The Director will review all carts. The Director will remove any titles that should not be ordered and verify the fund codes assigned. When the review is complete, the Director will transfer the cart to the Acquisitions Assistant. The Director should e-mail the Acquisitions Assistant to alert him or her that a cart has been transferred. The e-mail should include the name of the cart.