Anthology

Importing TitleSource 3 Carts from web

Overview

The TSource3 system by Baker & Taylor http://ts3e.informata.com/TS3/homepage.jsp allows bookstores to build Frontlist and Backlist orders and download them into the Visual Anthology program. If you need assistance in using the TS3 website please contact B&T customer service. This document will do a brief walk through of navigating to a cart, downloading it and then importing into Visual Anthology.

Setup

First you must have an existing account with B&T. If you do not already have an account or would like more training or assistance on using the TS3, please contact Electser@btol.com.

Once you have logged into TS3, start creating new carts of items you plan on ordering. You may have the option to submit your order right from the TS3 website but you can also download the titles into Anthology and send the purchase order from there. If sent from Visual Anthology you will have a record of what titles were confirmed during the EO process, what titles may be BackOrdered and what titles were cascaded to a new purchase order number.

Building Carts

Only basic steps are listed here, for greater detail or assistance please contact
Electser@btol.com.

First, create a basic cart to hold titles as you are building your potential order.

1. Click on the "CARTS" link near the top left of the screen. Note the right side of the Carts are shows you any pre-existing carts.
2. On the "Create New Cart- Quick Setup" fill in the name of the cart and select the account id this will be linked to.
3. Click Create Cart button when done.
4. You may wish to return to the Home page and select your newly created cart as the "Active Cart" before continuing.

As you do your searches, or work with suggested lists you have the ability to "Add to Cart". When looking at the detail of any title, the far bottom right corner of the screen will have an area marked "Quick Cart Controls- Add Title". Be sure to give a quantity for each title in your cart.

Once you've finished populating your Cart with the desired titles, it's time to download it as a file from the TS3 website and then import the file into Visual Anthology.

Downloading Carts

Only basic steps are listed here, for greater detail or assistance please contact Electser@btol.com.

Once you have created your cart you will need to download the file to your computer into a known directory and with a known file name. Watch very closely where you choose to save the file and what you choose the name it as you will need to be able to find that file during the import stage.

1. Go to the Carts link at the top left.
2. You should see all your existing carts on the right side of the cart screen
3. For each cart there is a "Select Function" field.
4. Select "Download" and click "Go".
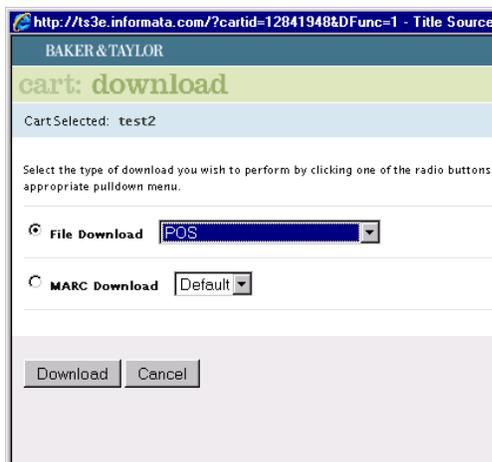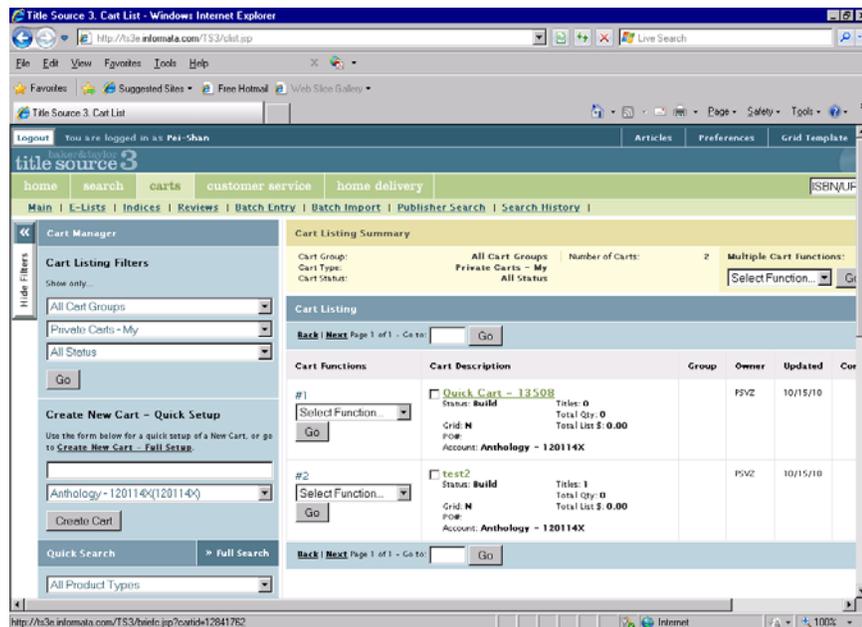
5. A new pop-up window will appear with the various format options.
6. Select File Download = **POS** and click Download
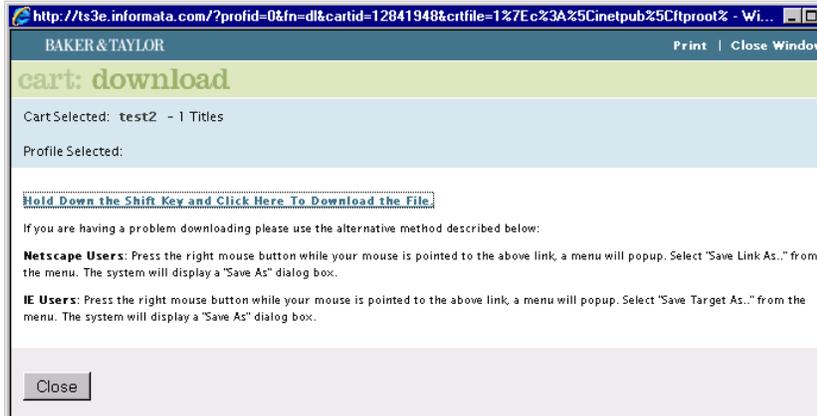
7. The Cart Download window appears with a blue link near the top. Follow the on screen instructions for your browser. Most stores are able to right click on top of the link and choose "Save Target As".

8. The easiest option is to Save As to the Desktop as shown here or you can save the file to your Anthology folder on your server.
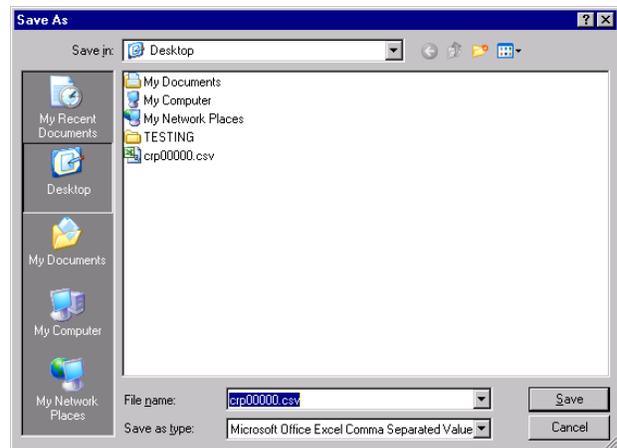
Important: Make note of exactly what you call the download file and where you save it. You will be browsing back to that location in a little while to import the file. Note that as of April 2010 TSource3 is not currently providing the Subject/Section codes in their download files to import with. You may wish to create your carts by Sections so you can control what Section is assigned to a group of items as they are imported en mass.

Importing TS3 Carts into Visual Anthology

You must be using Visual Anthology version 6.5.088 or higher in order to import the "Titlesource 3" format.

Once you have created your carts and downloaded the files you can begin the process of importing into Visual Anthology.

1. Go to TOOLS | IMPORT EXTERNAL
2. Make sure the checkbox for "Explicit Path" and "Save Settings" is checked.
3. You may wish to turn off the "Auto Fill" option until you are comfortable with importing files. Auto Fill sets the next title select to have identical Dept, Sect, Media, and Publisher values to the last title edited. This can be helpful if all the titles in the grid are the same classification but not helpful if you are working with a broad variety of titles.
4. Press "F6 Get" to begin browsing for your file.
5. On the new screen be sure to set the "Files Of Type" to "TitleSource II, TitleSource III".
6. Once the File of Type has been selected you can now browse to find the file you exported and select.
7. Click OK on the file you will be back on the CD Import screen, and see the titles you have selected to import.

Once the titles are displayed on the screen you can begin to fine tune any qty's for your orders and begin setting the preferred Department, Section, Media, and Publisher using the reference fields.

IMPORTANT! Dealing with Reference values

When you import the file the program does not pre-fill in your Department, Section, Media or Publisher directly.   Instead the grid will show those values in a special set of "Reference" fields. This is so you can accurately select those exact pre-existing values from the drop down lists. Note that you must already have those values existing before the import, the import cannot create them for you.

Import File Field Name	Import Screen Column Name
Type-DeptCode	RefDepartment
Binding-MediaCode	RefBinding
Subject-SectionCode	RefSubject
Publishercode	RefPub

To speed up the selection of the actual values for the records being imported, you can sort the grid by a particular column and then mass highlight all the items with the same RefSubject and mass reassign (shift+click on first and last record in the bunch). *Then go to the Actions menu and choose Reassign.* For example, say your items had "Grade 1-3" and "Grade 3-5" in the import file under Subject-SectionCode itself but in reality you just store those items in the Section called "Childrens". Just click once on the column header for RefSubject which will sort/group all similar records together. You can than mass highlight, go to Actions, choose Reassign and change the Section on all of those items at the same time.

Putting items on an order

If you wish to add these records to an existing order or memo use the field marked "Add Listed Records To:" to choose purchase order, receiving memo, customer order, etc. As you post the records you will be asked to select the memo/order from a list. You may need to create the PO or Receiving Memo just before starting the import.

Completing the Import

When you have made all the needed modifications press "F12 Post" to begin adding the items to your inventory.

If you have chosen to add listed records to a PO or Receiving Memo you will be asked to "Select" the PO or RM from a list. On OK, the importing process will begin. If you are adding a large amount of records please wait for the processing to complete before continuing on.