

**INGRAM LIBRARY SERVICES INC.  
SAILS, INC.**

Ingram, ipage, and Sirsi

**Table of Contents**

<b>IPAGE ADMINISTRATOR(S) AND USER(S)</b> .....	2
<b>OVERVIEW: CREATING INGRAM ON-ORDER RECORDS</b> .....	3
<b>CREATING/MANAGING YOUR CUSTOM MARC PROFILE</b> .....	4
<b>CREATING ipage GRID TEMPLATES</b> .....	5
<b>CREATING ipage SELECTION LISTS/ORDERING FROM INGRAM</b> .....	7
<b>ATTACHING GRID TEMPLATES</b> .....	8
<b>DOWNLOADING STANDING ORDER PROGRAM (SOP) REPORTS/TITLES</b> .....	9
<b>DOWNLOADING IPAGE SELECTION LISTS TO DESKTOP</b> .....	10

## **IPAGE ADMINISTRATOR(S) AND USER(S)**

To provide additional staff members with access to ipage, log in as your ipage administrator and click on the red "Change Settings" icon in the top right-hand corner of ipage Home. Next click on "User List," under "Administrator Settings." Type in a user name and then on "Submit." Fill out the short form and scroll down, to where you assign privileges (I generally recommend Account Manager privileges, being sure to check off "Ordering" if the librarian orders directly, and "MARC Records" if the librarian will be manipulating the custom MARC profile, Section 1, below) and then set access to accounts and a default account. Once submitted, Ingram will send a message with the URL and userID/password directly to that user.

**TIP:** Password changes can be done individually, also in the "Change Settings/User Settings" area.

**TIP:** Forgot your password? Visit [ipage.ingrambook.com](http://ipage.ingrambook.com) and click on the Forgot Your UserID or Password link. Enter your email address and ipage will send your information instantly.

## OVERVIEW: CREATING INGRAM ON-ORDER RECORDS

Following is a general process for ordering via ipage and then downloading into Sirsi. Each step will be further detailed in the next sections. Feel free to contact Cathy Suehisa at (781) 439-0575 or [cathy.suehisa@ingrambook.com](mailto:cathy.suehisa@ingrambook.com) with questions.

1. **CREATE** your custom MARC profile.
2. **CREATE** your grid templates.

**NOTE:** These first two steps only need to be done once, unless you acquire additional fund codes with which to order. Day-to-day ordering starts from step 3, below.

3. **BUILD** your selection list in ipage.
4. **ATTACH** the corresponding grid template to the selection list.

**NOTE:** You can attach the grid template to your selection list before or after ordering from Ingram; the only requirement is that you attach the grid template before downloading.

5. **ORDER** your selection list.
6. **DOWNLOAD** the selection list in **CUSTOM MARC EAN FORMAT** to your desktop or designated folder.

**TIP:** You can change your default download setting to “Custom MARC Format” by clicking on “Change Settings,” then “User Settings” under “Individual Settings.”

7. **IMPORT** the downloaded file into Sirsi. (Sails, Inc. has documentation for this section of the process. To obtain a copy, or if questions arise during the import process, please contact Kristin Slater at (508) 946-8600 or [kslater@sailsinc.org](mailto:kslater@sailsinc.org) for help.)

## CREATING/MANAGING YOUR CUSTOM MARC PROFILE

The Custom MARC Profile contains the information required by Sirsi to process your imported file correctly, in addition to the information you want the on-order record to contain (fund codes, physical description, etc.). Again, keep in mind that this is a one-time setup. The main reason for revisiting this area of ipage will be to add new fund codes, if any arise. Sails has mapped the Custom MARC Profile as follows:

Tag #	Subfield	Data Element	
250	a	ed.	Edition
300	a	Other Input customer data element	Physical Description
949	f	Fund	
949	h	Other Input customer data element	Holding Code
949	o	Order (Batch) PO	
949	p	Price	
949	q	Copies (Total Quantity)	
950	a	Other Input customer data element	Acqupdate

Values to add are as follows:

Tag	Values
250	ed.
300	p. cm.
949 f	Your library's fund codes
949 h	Your library's holding code
950	A

To create your Custom MARC profile:

1. Log in as your ipage administrator.
2. Click on the Change Settings icon in the top right-hand corner of ipage home.
3. Click on ipage Settings (if you are not logged in as the administrator, you will not see this option; call Cathy to verify your ipage administrator if this happens).
4. Click on the MARC Settings icon in the first section of the page, on the right-hand side.
5. Select Unicorn as your Acquisitions Vendor.
6. Enter your password and click on Continue.
7. Enter each tag and subfield from the first chart, above.
8. Next to each data element entered, click on the "Add/Edit Values" button to the right and enter the Values, listed in the second chart, above. Be sure to click on Complete after you've entered each Value.
9. Click on Complete.

You can revisit this section at any time to add new data elements (once they've been approved and mapped by Sails), or to add new fund codes.

## CREATING ipage GRID TEMPLATES

Grid Templates attach the library-specific information in your custom MARC profile to each of your orders. For example, a selection list containing 10 adult fiction titles will require a grid template containing the fund code “ADF,” or whatever you've selected.

**NOTE:** You will be building separate selection lists for each fund code/grid template, so it's recommended that you keep the number of fund codes to a minimum, unless your internal processes require more separation of categories. For example: Library A needs to order Adult Fiction and Non-Fiction separately, so needs both ADF and ADNF grids; Library B has a single Adult fund that covers both types of material, so needs only an “Adult Book” template.

### Grid Template #1

The first grid template setup takes the longest. For subsequent templates, you can base your setup on the first grid you've created, and simply change the fund code. For the first template:

1. Log on to ipage and click on the Order tab.
2. Next click on Grid Templates Setup and name your grid, e.g., ADF or Adult Book.

**NOTE:** Grid templates default to a “private” setting, meaning that other ipage users are unable to access the grids you create for yourself. If more than one librarian will be utilizing the grid, be sure to make the grid “public.”

3. Change the Template Access Type to “public,” if desired (see note, above).
4. Click on Add.
5. A popup window will appear with checked boxes next to Physical Description, Fund, Holding Code, Acqupdate. Click Continue. If any of these boxes do not appear, your customized data elements have not been entered correctly; please contact Cathy. If the pop-up window does not appear, set your browser to allow for pop-ups from the site.

**TIP:** To allow for pop-up windows, click on the Tools drop-down menu, then on Pop-up Blocker and Turn Off Pop-up Blocker.

6. In the next dialogue box, disregard the first empty row, and instead check off the empty box under the checkmark sign, then enter “1” under the “Qty” heading.

**NOTE:** This is your default quantity, and will override any quantity changes you make directly in your selection list. If you order multiple copies more often than not, you can either select a different default quantity. If your quantities differ markedly for each title, leave the quantity field blank and contact Cathy for further training (you will attach grid information on the single title level, and instructions for that approach are not documented here.)

7. Select your fund code (the one that matches the grid template name) from the drop-down window in the next column, and then your holding code in the next column.

8. Select the A in the Acqupdate column.
9. Scroll all the way to the bottom of the screen and select p. c.m. in the Physical Description Section.
10. Click on Complete.

This grid template will now appear in the list of grid template options for every Selection List you create.

### **Additional Grid Templates**

1. Click on the Order tab then on Grid Templates Setup.
2. Name your grid, e.g., ADNF or Juvenile Book.
3. In the next row (Based on Existing Template), select the first grid template you created.
4. Change the Template Access Type to “public,” if desired.
5. Click on Add.
6. Click on Continue in the pop-up window.
7. Change the fund code in the second column to match your grid template name.
8. Click on Complete.

Repeat this procedure for each fund code.

## **CREATING ipage SELECTION LISTS ORDERING FROM INGRAM**

Building a selection list (rather than using the Quick Order feature) is required for full ipage functionality (duplicate checking, grid templates, etc.). To build a selection list:

### **Batch ISBN ordering:**

1. Log on to ipage and click on the “Selection Lists” shortcut in the top right-hand corner of ipage home, then on “Create New List.”
2. Type in a selection list name and enter ISBNs into the “Product Codes” box, separated by a comma OR a space.
3. Type in a “List Note,” if desired.
4. Click on “Create.”

At this point, you can View your list, Price the List to see discounted (MARLS) pricing, check stock on the entire list, duplicate check, or place the order.

### **To add individual items to a new or existing list:**

1. Search for an item using the Simple Search bar across the top of every ipage screen.
2. Open the desired title, then move to the “Selection List Options” area just under the real-time stock check matrix. Select “New List” or locate an existing list. **NOTE:** When selecting “New List,” ipage will prompt you to enter a list name.
3. Type in a line item note, if desired.
4. Click on “add.”
5. When complete, locate your selection list by clicking on the “Selection List” shortcut at the top of every ipage screen.

At this point, you can Price the List to see discounted (MARLS) pricing, check stock on the entire list, duplicate check, or place the order.

**NOTE:** Managing selection lists. The Selection Lists screen can get crowded with multiple selectors. To minimize the number of selection lists at any given time, use the Merge lists feature -- when merging, being sure to delete the original selection list, but note that you will lose the original purchase order information for the individual titles (though you will retain grid information). The recommendation is to merge lists only after all titles have been ordered, into a list called “Master ADF,” for example, appending a number onto each successive list. Remember, too, that you can always search for selection lists by Creator to see only your selection lists.

**NOTE:** Don’t worry about accidental deletions! Lists are recoverable for three weeks!

For help or additional training, please contact Cathy Suehisa, Ingram Account Manager, at (781) 439-0575, or [cathy.suehisa@ingrambook.com](mailto:cathy.suehisa@ingrambook.com).

## ATTACHING GRID TEMPLATES

**Before downloading the selection list to your desktop, you must attach grid information so that Sails can properly load your records.**

1. Locate your selection list by clicking on the “Selection List” shortcut at the top of every ipage screen.  
**TIP:** Sort by “Last Edited Date” to bring your most recent selection list to the top.  
**TIP:** You can use the simple search bar to search only for lists created by you.
2. Click on the “Choose Grid Template” drop-down menu and select a grid template.
3. Click on “Apply Template.”
4. Click on “Download.”

**NOTE:** The default grid quantity will override any quantity changes you have made when creating your selection list. To alter the quantity for an individual title, attach the grid template and then click on Edit. Click on the ## Grid Info icon below the title that requires multiple copies and change the quantity there, being sure to click on Complete before exiting.

**NOTE:** There is a way to manipulate quantity information within the grid as you build your selection list, but it’s relatively rare for libraries to adopt this process, so please contact Cathy if you’re interested in this option.

## **DOWNLOADING STANDING ORDER PROGRAM (SOP) REPORTS/TITLES**

Since ipage's last upgrade in July, 2008, Ingram's standing order programs have become much more flexible:

1. You can enroll online;
2. You can update your profile online in real-time;
3. You can opt for automatic shipments OR a report-only profile (pre-notification of titles coming out, according to your profile);
4. You can make changes to quantity or title level selection for two weeks before titles are ordered;
5. You can dupe check your Standing Order Program titles against firm order selection lists; and,
6. You can download standing order program titles into Sirsi to create on-order records.

Standing Order Program options and enrollment are located under the Programs & Catalogs tab within ipage. For every profile you create, whether auto ship or reports-only, Ingram will post a selection list announcing new titles for that profile, every other week.

For Continuations (travel and reference titles), selection lists will post on the 8<sup>th</sup> and 23<sup>rd</sup> of each month. For all other programs, lists post on the 1<sup>st</sup> and the 15<sup>th</sup>. The contact on the SOP profile will receive an email alerting them whenever a new selection list is posted.

### **Locating/Downloading SOP selection lists:**

1. Click on the Selection Lists shortcut;
2. Change your "Display" to view "Program Lists Only";
3. Sort by Last Created Date and your most recent lists will pop to the top;
4. Review, edit if necessary, and submit the order if you are set for reports-only;
5. If set for auto ship, review and this list will automatically order in two weeks from date of posting;
6. Select a grid template;
7. Download (see next section).

## DOWNLOADING IPAGE SELECTION LISTS TO DESKTOP

There are two options for downloading a selection list:

1. From your confirmation screen, after placing your order; or,
2. From your original selection list.

**NOTE:** The first option requires a click or two less, and will strip out any titles that cancel from your order; however, you will not be able to enter an Order (Batch) PO number with that option.

### Downloading from the confirmation screen:

1. Locate your Selection List and click on Order (your grid template should already be attached);
2. Continue through until you Confirm your order;
3. At the confirmation screen, locate the Download button in the bottom right-hand corner;
4. Check your **Download Options:**
  - a) in the **Format** section the first box should be set to **Download & Keep**.
  - b) in the **Format** section the second box should be set to **Custom MARC EAN Format**.

**TIP:** You can change your default download setting to “Custom MARC Format” by clicking on “Change Settings,” then “User Settings” under “Individual Settings.”

5. Click on **Download**.
6. In the **File Download** box click on the **Save** button.
7. In the **Save As** box:
  - a) Make sure that the **Save in** box says **Desktop (or the name of the designated folder for these Ingram files)**.
  - b) Enter the name you want to call your file in the **File Name** box. (Make sure that the **File Name** is something that is meaningful to you, e.g., “ingram.”)
8. Click on the **Save** button.

### Downloading from a selection list (before or after placing the order):

1. Locate the selection list.
2. Attach the appropriate grid template.
3. Check your **Download Options:**
  - a) in the **Format** section the first box should be set to **Download & Keep**.
  - b) in the **Format** section the second box should be set to **Custom MARC EAN Format**.

**TIP:** You can change your default download setting to “Custom MARC Format” by clicking on “Change Settings,” then “User Settings” under “Individual Settings.”

4. Enter your Order PO number in the (Optional) dialogue box on the right-hand side.
5. Click on **Download**.
6. In the **File Download** box click on the **Save** button.
7. In the **Save As** box:
  - a) Make sure that the **Save in** box says **Desktop (or the name of the designated folder for these Ingram files)**.
  - b) Enter the name you want to call your file in the **File Name** box. (Make sure that the **File Name** is something that is meaningful to you, e.g., “ingram.”)
8. Click on the **Save** button.

From here, you will work within Sirsi, and Sails documentation takes over and covers scheduling of reports and loading records. Again, feel free to call either Cathy or Kristin if questions arise, and good luck: )!!

Cathy Suehisa, Account Manager (New England)  
Ingram Library Services Inc.  
(800) 937-5300 x37476 phone (voice mail)  
(781) 439-0575 phone (direct)  
(615) 213-5111 fax  
[cathy.suehisa@ingrambook.com](mailto:cathy.suehisa@ingrambook.com)

Kristin Slater, Manager of Bibliographic Services  
Sails, Inc.  
(508) 946-8600  
[kslater@sailsinc.org](mailto:kslater@sailsinc.org)