Using Brodart Bibz II with grid templates

www.bibz.com

username: <1st initial + last name> (ex. cspink)

password: welcome

Creating a list

Search for title

View title info and reviews by clicking title link (return by clicking "brief" button)

Select the title by clicking the check box at left.

Change quantity to the number of copies you want to order.

Choose grid template & click "apply" (unless all list titles will have same grid)

Change fund or collection code, if needed, by clicking on the current entry in that field

Name your new list and click "apply" to add to list

If all list titles share the same grid values,

When your list is complete, click the square check box at the top of the list

Choose grid template, then click "apply"

Checking for duplicate orders

Before sharing your list, make sure there are no duplicate orders on it.

Open the screen showing your list of titles. There is a cluster of icons at right of each title.

If letter "O" icon appears, click it to make certain it has not already been ordered by your library.

A list of current unordered lists will appear, followed by a list of ordered copies and their libraries.

Remove any duplicate titles from your list, either by:

1. Opening the grid, and changing the quantity to "0", and click "Apply", or

2. Check the box at left of title, and pull down the "Update list" menu. Then choose Delete selected items, and Apply.

Sharing a list

From the "lists" screen, click the link in the "status" column

Choose the users you want to access your list

Choose an access level

Click "apply"

To order your list,

Make sure all entries have grid templates. (They'll have a "+" beside them.)

Then share it to CSPINK, and choose "full" for access level.

Bibz II tips & tricks

Bibz navigation

1. Clicking "apply" saves your changes (Apply = save)
2. The home screen doesn't display all lists; use the "lists" tab to see all your lists.
3. "Special lists" are generated by Brodart. You are welcome to use them to place orders.
4. "Order history" displays a list of orders. Search for yours using your CCLS delivery code in the PO number field, or keep a list of your list names.
5. From the order history screen, click the PO number to check the status of your order.
6. An asterisk (*) means that the Brodart price is above list price. You may want to consider another vendor, especially for Thorndike large print.

Grids

7. There must be a grid code applied to every title ordered. Orders do not load at Brodart without them, nor can they load into Sirsi. The list will be returned to you if there are grids missing.
8. The "notes" field in the grid template doesn't transmit to Brodart. "Call number" doesn't, either.
9. To change your fund for a title in your list, open the grid, then click on the name of the fund. If you have more than one fund, a drop-down box will appear with all your available funds.

CCLS

10. To keep track of your orders, I'll use this format for PO numbers: <delivery code>-<initials of list owner>-<date> (OLE-LC-120705). For those libraries with only one person trained, I'll use: <delivery code>-<date>.
11. Please keep CBA orders on separate lists, to minimize confusion in the CCLS business office.
12. Audio-books and Center Point and Thorndike large print can still be ordered by slip for now.
13. We can still order via Amazon.com, but your items will arrive unprocessed. Again, use slips.
14. Call Chris (716-484-7135 x 248) with questions, problems, etc.