



ULS Ordering Procedure: Member Library Staff

Revised: September 2015

INTRODUCTION

9xx ordering allows library staff to select materials for ordering on the vendor's web site. The selector does this by placing items they wish to order into a shopping cart, choose the holding codes and funds and when he/she is done shopping, click on the checkout button and transfer it to Shortgrass Library Staff.

Shortgrass staff can then download the brief bibliographic records and holding information on to Symphony by running a couple of reports. We will then double check the funds and holding codes and electronically order the materials from ULS.

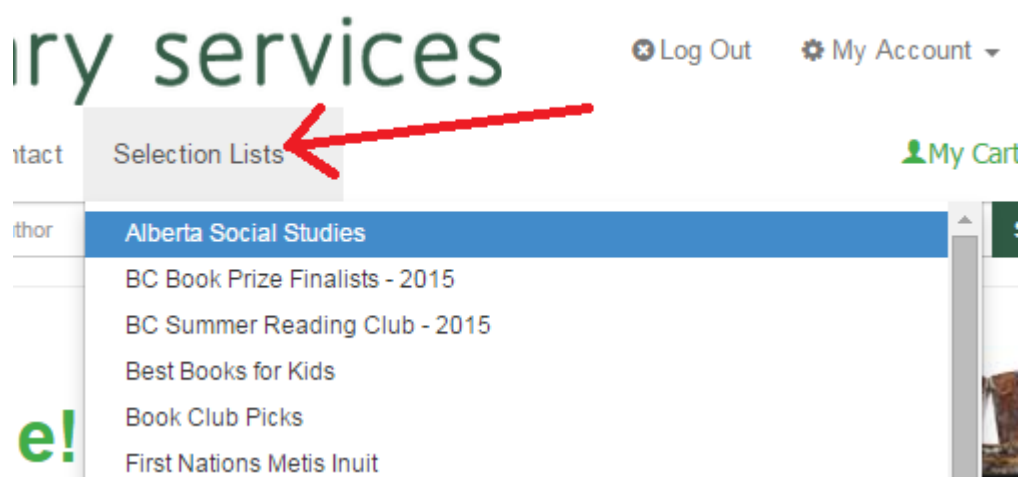
SEARCHING TECHNIQUES

There are 2 ways to search items on the ULS website.

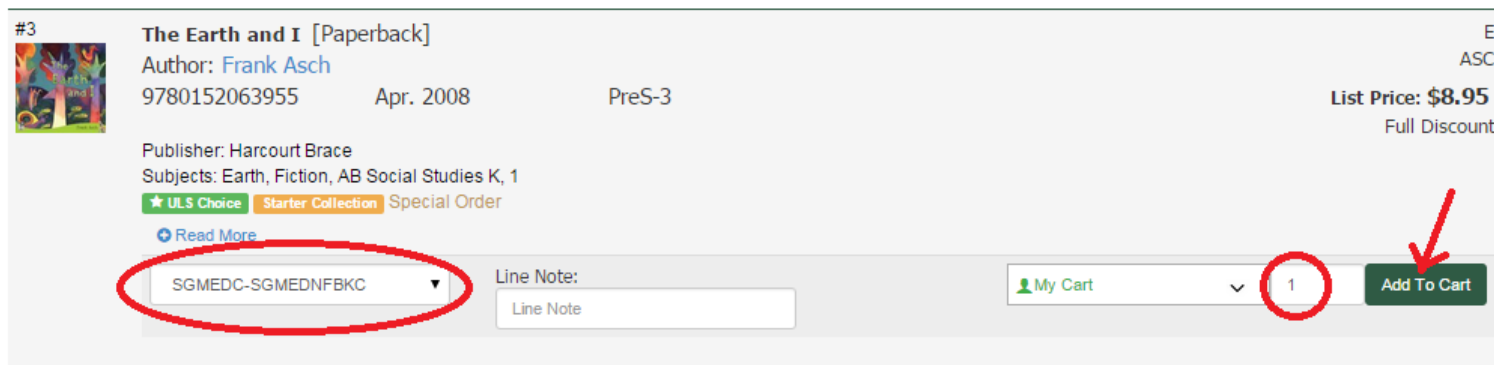
- A) Browse selection lists created by ULS
- B) Search for specific item through the Quick search or Advance Search

A) Browse the Selection List

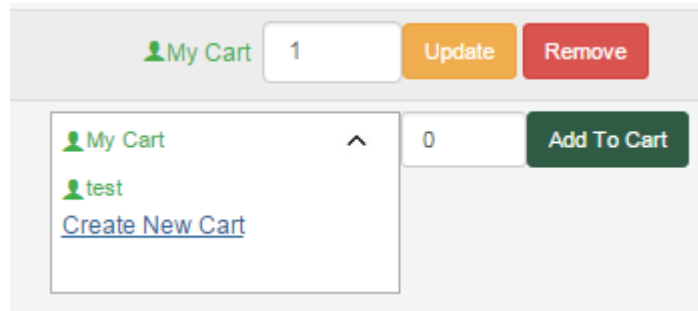
- 1) If you want to browse the lists provided by ULS, click “Selection Lists” at the top of the screen.



- 2) In this example, we picked the “Alberta Social Studies” Selection List, chose the 3rd item, changed the quantity to 1, and using the drop down window, we selected the appropriate Sonata Template (fund & holding code i.e., SGMEDC-SGMEDNFBKC). Finally, we clicked “Add to Cart”.



3) ULS creates a default shopping cart for you called “My Cart”. If you wish, you can create a new cart with a custom name. To do this, click the dropdown next to “My Cart,” click “Create New Cart,” and then enter a name for your cart.

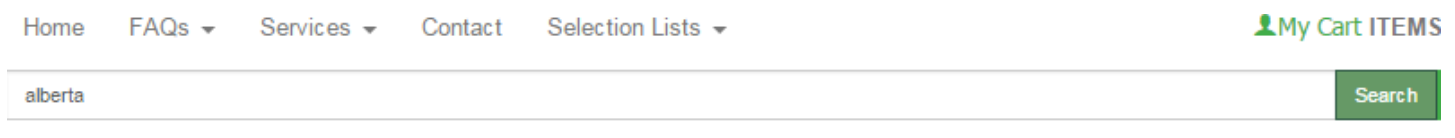


4) If you wish to order 2 copies with different funds and holding codes: first, using the drop down window, choose Sonata template (fund and holding code) for the first item, quantity and ADD to cart. Then, using the drop down window, click on the next Sonata template, quantity and ADD to cart.



B) Search for specific item

1) Quick search or advanced search is located at the top of the screen. We can search by title, author or ISBN. In this example, we type in “Alberta” and click “Search”.



2) On the Quick Search Results list, you can choose the item you want to purchase.

3) Click and choose the appropriate Sonata Template (Fund and holding code) by using the drop down window, enter your quantity and click ADD to cart, like the example below.

#1 **Greenglass House** [Hardcover] FIC-JUV

Author: [Kate Milford](#) Illustrator: [Illus. Jaime Zollars](#)

9780544052703 Aug. 2014 Grade 5-9

List Price: \$22.99
Full Discount

Publisher: Clarion Books

Subjects: Hotels, motels, etc., Fiction, Magic, Fiction, Mystery and detective stories

★ ULS Choice Starter Collection Special Order

[Read More](#)

SGMEDC-SGMEDNFBKC Line Note: My Cart 1 [Add To Cart](#)

- 4) If you wish to order 2 copies with different funds and holding codes: first, using the drop down window, choose Sonata template (fund and holding code) for the first item, quantity and ADD to cart. Then, using the drop down window, click on the next Sonata template, quantity and ADD to cart.

Sonata Template: **SGMEDC-SGMEDNFBKC** Line Note: My Cart 1 [Update](#) [Remove](#)

Choose Sonata Template: **SGMEDC-SGMEDEBKC** Line Note: My Cart 1 [Add To Cart](#)

COMPLETING YOUR ORDER

- 1) Once you have completed your order, click on View Carts in the top-right corner of the screen and then click on the cart name for the order that is ready to submit.

Hello Chris Field

Account ▾ Manage Carts [View Carts](#) ▾

| CART NAME | ITEMS | QTY | TOTAL |
|----------------------|-------|-----|--------|
| My Cart | 2 | 2 | \$5.82 |

[Search](#) [Advanced Search](#) [Special Order](#)

- 2) You will be brought to a new screen listing all of the items in your cart. Double-check the quantities and the Sonata templates to make sure they are correct. When you are ready to submit your order, click “Proceed to Checkout” in the bottom-right corner of the screen.

- 3) A page will appear that says “You cannot submit your order directly to ULS”. Select ***SLS Acquisitions*** from the dropdown menu and click the “Transfer Cart” button at the bottom to send your order to Shortgrass. You can use the comments box to send a special message to Shortgrass re: your order.
- **MHPL staff****: you must submit your order to your supervisor instead of ***SLS Acquisitions***. Select your supervisor’s name from the dropdown menu and click “Transfer Cart” to do this.

You cannot submit your order directly to ULS

However, you have the option to Transfer your cart to one of your Authorized Purchasers.

SLS Acquisitions (acquisitions@shortgrass.ca) ▼

To Transfer this cart, having selected an Authorized Purchaser, click the "Transfer Cart" button below.

If you have any comments for your Authorized Purchaser, please enter them into the box below BEFORE transferring your cart.

For your records, your transferred cart's new name is: AP-chrfe@medicinehat.ca-20150918_120357

If you choose not to Transfer the cart at this time, it will still be listed under "Manage Carts" with the name you gave it.

Once you Transfer this cart, it will no longer be listed under "Manage Carts".

To make a copy of it first, go to the View Cart page from where you can "Print Cart" or "Create Excel". Click "Proceed to Checkout" again.

Transfer Cart


HOTLIST SELECTION LIST ORDERING FROM ULS

1. Login to the ULS website (<https://www.uls.com>) using your email and password.



2. **CREATE A CART ON ULS:**

- a. Click **Manage Carts** (top right of screen).

 Manage Carts

- b. **Enter the cart name** using your **Library's name + Hotlist** under Create a New Cart (left of the screen).

Create a New Cart



- c. **Click Add.** You will receive confirmation when it's created.

Create a New Cart

New Cart "Shortgrass Hotlist Test Cart" created! 

3. **ORDER FROM THE ULS SELECTION LIST(S):**

There are 2 ways to do this.

- a. **Search the ISBN from the paper catalogue** using the Quick Search box.

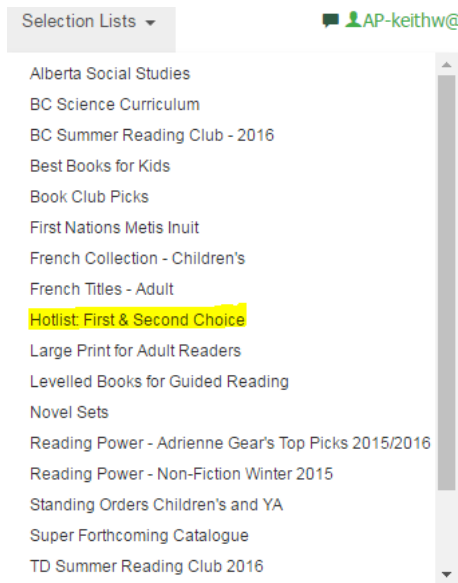


- b. [Click Selection Lists](#) on the ULS website to view the selection lists.

united library services

🏠 [FAQs](#) ▾ [Services](#) ▾ [Contact](#) [Selection Lists](#) ▾

- i. [Click Hotlist First & Second Choice](#)



- ii. The Hotlist Editions are listed across the top of the page with deadlines for submitting the order. [Make sure the most recent Hotlist Edition is selected.](#)

The name of the hotlist you are viewing will be indicated in bold green font (highlighted below).

Adult Bestsellers - Hotlist Fiction Fall 2016

[Hotlist Editions:](#) **Fall 2016** | [Spring/Summer 2016](#) | [Winter 2015-2016](#) | [Fall 2015](#)

Orders for the Hotlist Fiction Fall 2016 Hotlist are due by **August-03-16**. Thereafter, in-print Hotlisted titles can be special ordered.

| | |
|----------------|--|
| Hotlist: | Hotlist Non-Fiction Fall 2016 |
| Second Choice: | Second Choice Fiction Fall 2016 or Second Choice Non-Fiction Fall 2016 |
| Addenda: | or |

1. Hotlist Editions are listed from left to right, most recent to least recent.

2. To view different Hotlist Editions, click the blue selection list name

Hotlist Editions: [Fall 2016](#) | [Spring/Summer 2016](#) | [Winter 2015-2016](#) | [Fall 2015](#)

- iii. **Switch between the Fiction, Nonfiction and Second Choice lists, by clicking the blue list name** listed below the Hotlist Editions.

When viewing the Fiction list, you will see the option to click the Non-Fiction list (Image 1) and when viewing the Non-Fiction list, you will see the option to view the Fiction list (Image 2).

Image 1:

Hotlist Editions: [Fall 2016](#) | [Spring/Summer 2016](#) | [Winter 2015-2016](#) | [Fall 2015](#)

Orders for the [Hotlist Fiction Fall 2016](#) Hotlist are due by **August-03-16**. Thereafter, in-print Hotlisted titles can be special ordered.

Hotlist: [Hotlist Non-Fiction Fall 2016](#)
Second Choice: [Second Choice Fiction Fall 2016](#) or [Second Choice Non-Fiction Fall 2016](#)

Image 2:

Hotlist Editions: [Fall 2016](#) | [Spring/Summer 2016](#) | [Winter 2015-2016](#) | [Fall 2015](#)

Orders for the [Hotlist Non-Fiction Fall 2016](#) Hotlist are due by **August-03-16**. Thereafter, in-print Hotlisted titles can be special ordered.

Hotlist: [Hotlist Fiction Fall 2016](#)
Second Choice: [Second Choice Fiction Fall 2016](#) or [Second Choice Non-Fiction Fall 2016](#)

- iv. Scroll through the list of selected titles, adding them to your cart.

4. **ADDING ITEMS TO THE ULS CART:**

- a. **Scroll down and select your cart's name** (highlighted in the image below).

#1 **Rogue One: A Star Wars Story : Movie Novelization** *Movie tie-in.* [Hardcover] FIC
ROG

9780399178450 Jan. 2017 Adult List Price: **\$38.99**
Full Discount

Science Fiction

Publisher: Ballantine Books
Subjects: FICTION / Science Fiction / Space Opera, FICTION / Science Fiction / Adventure, FICTION / Action & Adventure

★ ULS Choice Stocked Item

[Read More](#)

Choose Sonata Template Shortgrass Hotlist Test Cart 0 [Add To Cart](#)

b. **Click the down arrow next to “Choose Sonata Template” and select the holding code.**

Choose Sonata Template ▼

c. **Enter the quantity (i.e. 1) and Click Add To Cart.**

[Add To Cart](#)

#1 **Rogue One: A Star Wars Story : Movie Novelization** *Movie tie-in.* [Hardcover] FIC
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[Read More](#)

SGMEDFA-SGMEDFBK Shortgrass Hotlist Test Cart 1 [Add To Cart](#)

d. **A confirmation message will pop up, indicating the item has been added to the cart.**

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9780399178450 Jan. 2017 Adult List Price: **\$38.99**
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★ ULS Choice Stocked Item

[Read More](#)

Sonata Template: SGMEDFA-SGMEDFBK Shortgrass Hotlist Test Cart 1 [Update](#) [Remove](#)

Choose Sonata Template: Shortgrass Hotlist Test Cart 0 [Add To Cart](#)

e. The quantity & total cost will increase in the top right region of the screen as you add items to the cart.

Shortgrass Hotlist Test Cart ITEMS: 1 QUANTITY: 1 TOTAL: \$24.17

- f. **Note:** ULS usually remembers the Sonata template and cart you are adding to, after you enter it the first time.

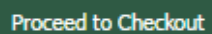
5. **COMPLETING YOUR ORDER:**

- a. **View your cart by clicking on your cart's name** (top middle right of screen in green font)

 Log Out  My Account ▾  Manage Carts  View Carts ▾

 **Shortgrass Hotlist Test Cart** ITEMS: 1 QUANTITY: 1 TOTAL: \$24.17

- b. **Double check the quantities and Sonata templates are correct.**
- c. When you are ready to submit your order, **click Proceed to Checkout** (bottom right of the screen).



- d. A page will appear that says “You cannot submit your order directly to ULS.”
- e. **Select *SLS Acquisitions*** from the dropdown menu and **click Transfer Cart** to send your order to Shortgrass. You can use the comments box to send a message to Shortgrass regarding your order.

You cannot submit your order directly to ULS

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Transfer Cart

- f. **Email Shortgrass Acquisitions** (acquisitions@shortgrass.ca) to let us know you've submitted a Hotlist Selection List cart on ULS.