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# Whitehots Ordering Procedure: Member Library Staff

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## **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 Whitehots.

## **LOGGING ON TO WHITEHOTS**

1. Open either Firefox, Internet Explorer or Google.
2. Type in the address command line <http://www.whitehots.com/>
3. Enter your Username and Password and click LOGIN button

## SEARCHING TECHNIQUES

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

- A) Browse through preselected lists created by Whitehots.
- B) Search for specific item through the Quick search.

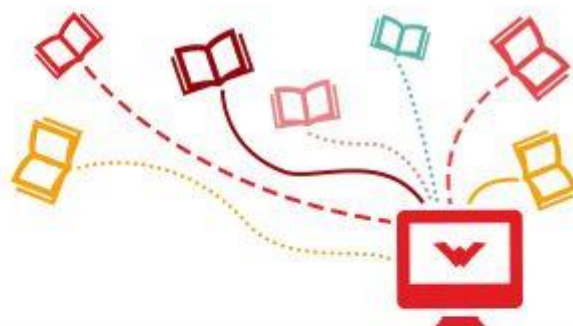
### A) Browse the Preselected Lists

- 1) If you want to browse the lists provided by Whitehots, they are displayed on the main page of the HUB on the website.

**WELCOME TO THE HUB**

Feel free to Explore

 **Select A Hotlist**



2016 FALL BESTSELLERS ▶

Adult ▶

Schools ▶

Young Adult ▶

Young Readers ▶

- 2) If you click on one of these heading it will open into subcategories, which can be further divided down by clicking on the red arrows.

Adult	▼
Audio	▶
Awards	▶
Choice Selections	▶
Collection Development	▶
Fiction	▼
2016 Winter Bestsellers	▼
Fiction Bestsellers	
Supplement	
2016 Spring Summer Bestsellers	▶
2016 Fall Bestsellers	▶
French	▶

3) When you find a title that you wish to order, first click on Create a cart located on the right side of the page. When naming a cart it is a good practice to include your initials and the date for example KT\_NF\_July07

Active Carts

🛒 test 1

View All Carts
Create New Cart

CREATE CART

- 4) Click on the number in the ad box if you wish to order more than one copy, if not click on the green add. It will change the number 0 to 1 in the cart box. It will always add the titles to the first cart listed, if you want to switch carts, click on the cart name and it will move it to the top.
- 5) Once you have completed your section you will still need to assign the funds and the holdings.

## **B) Search for specific item**

- 1) Quick search is located above the cart listings. Enter an ISBN, title or author and click GO. For a more advanced search, click on search and it will take you to a screen that allows you to fill in multiple search fields.

The screenshot shows a library website interface. At the top, a red navigation bar contains links: Main, Your Carts, Your Orders, Your Profile, Tasks, Request, and Search. On the right side of this bar is a 'Quick Search' input field and a 'GO' button. Below the navigation bar, the main content area is titled 'SEARCH BOOKS'. Underneath this title is a search form with the instruction 'Fill in one or more fields to narrow your search.' The form has four input fields: 'Title:', 'Author:', 'ISBN 13:', and 'Subject:'. To the right of the search form, there are two sections: 'Browse By Subject' with a book icon and 'Active Carts' with a shopping cart icon. The 'Active Carts' section shows a table with two rows: one for 'KT\_NF\_July7' with a quantity of 0, and one for 'test' with a quantity of 1.

- 2) On the Search Results list, you can choose the item you want to purchase. Add it to the cart in the same manner

## **Allocating Funds and Holdings**

- 1) Once you have finished adding items to your cart, you must add allocations for each. To do this:
  - a. Click your cart name on the right side of the screen
  - b. A list of all the items in your cart will be displayed. Click the title (in red) of the first item in the list.

- c. Scroll down to the bottom of the next page that appears. This is where you enter the allocation information. You must enter branch, holding code, and fund code in the appropriate place. Then click the “Allocate” button

- d. Click in each area and start typing, and drop down list will appear. Select the appropriate selections for the title. Click “Refresh Allocations.” Then click “Next book” at the bottom. Repeat this step until you have entered allocations for all the items in the cart. Click “Back to Cart” when you are finished.

- e. After you have finished allocating, double-check the items in your cart. You must make sure that there is 1 in the cart and 1 allocated for each title. If an item says 0 allocated, click on the title and add the allocation information.

### **Assigning Carts to Shortgrass Library System**

1. When you are ready for the order to be submitted, click on the cart name
2. Click on Assign and scroll down the list to \*SLS Acquisitions\*
3. Click Assign this cart. Once you have assigned this cart to someone it disappears from your list but you can still access it under Your Orders

## **Introduction of the Tool bar**

### **Your Carts tab**

- a) Lists all carts that are active in your account
- b) You can delete carts and merge carts by clicking on the drop down

### **Merging carts**

- i. Click on the box next to the carts you wish to merge
- ii. Choose Merge selected carts from the drop down menu
- iii. A window will open to allow you to name the new cart. Type the new name into the text box and click OK. You can also choose to remove the original carts at this stage by selecting the box Remove merged carts. You now have a new merged cart that contains all the titles from all the original carts you selected.
- iv. After you have merged your carts, you can either delete or retain the original carts

### **Deleting carts**

- i. Click on Your carts tab
- ii. Click on the box next to the cart you wish to delete
- iii. Using the drop down, choose Delete selected carts