

3M Cloud Library Ordering

(Edited November 14, 2014)

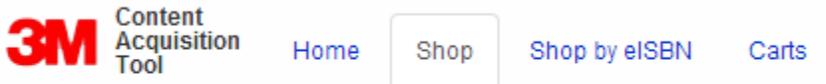
The **Google Chrome browser** is the best suited to the 3M ordering software. Internet Explorer does not function optimally and may freeze.

Log in at: cat.3m.com (content acquisition tool)

Username: _____ (your email address)

Password: _____ (created by yourself)

Click on the **Shop** button at the top of the screen:

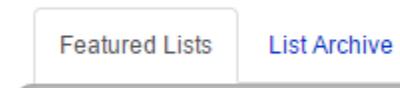


Search for desired titles:

The image shows a "Criteria Builder" search window. It contains several input fields and buttons. At the top right is a close button "X". Below are fields for "Title", "Author", and "eISBN", each with an "Add" button. There are also buttons for "Category" and "Publisher / Provider" with arrows. Below these are two dropdown menus: "Published within 60 days" and "Date Added to Catalog...". A section for "Purchase range:" includes input fields for "Min" and "Max" with dollar signs and ".00" suffixes. There are also dropdown menus for "Language" and "Media Formats". At the bottom left is a "Hold Ratio >=" field with an "Add" button. A checkbox labeled "Not in my Library" is at the bottom left. At the bottom are two large buttons: "Update" and "Clear All".

Alternatively, you can browse the *Featured Lists* and the *Archives* for suggested titles to purchase.

Near the top left of the screen click on either tab



You can also run the *Holds Ratio* report or the *Wish List* report to see which titles have many holds waiting, or which titles they wish TRAC would purchase.

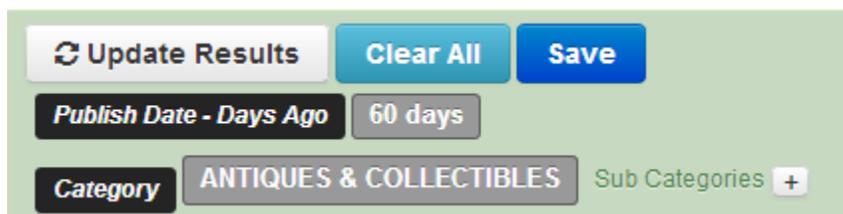
See pages 4 and 5 for information on how to run the Wish List and Holds Ratio reports.

NOTE: You must allow pop-ups to make the Reports feature work.

Or use the **Quick Search** bar at the top right of the screen:

The image shows a "Quick Search" bar. It has a text input field containing "Search: Title, Subtitle, Author". To the right of the input field are three buttons: "Search", "Hide" (with a magnifying glass icon), and "Saved Searches".

Once you've selected your search parameters, either from the *Criteria Builder* or from the *Quick Search* bar, your parameters selected will display at the top right of the screen:



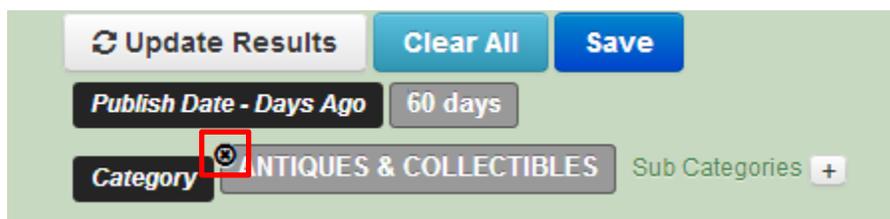
- I used the *Category* button in the *Criteria Builder*,
- and selected *Antiques & Collectibles*;
- I also used the *Published within...* button and selected *60 days*.

For your first search of the session, the screen will automatically display the results directly below the search parameters:

1-8 of 8 Results ⚙️

| Quantity | Title | Author | Publisher | Publication Date | eISBN | Price | Format | Owned | Holds | InCart |
|--|--|-------------------|--|------------------|---------------|---------|--------|-------|-------|--------|
| <input type="checkbox"/> 1 + - |  Auto Biography <i>A Classic Car, an Outlaw Motorhe...</i> Added to 3M™ CAT: 2014-05-06 ⓘ | Swift, Earl | It Books | 2014-05-06 | 9780062282675 | \$21.59 | EPUB | 0 | 0 | 0 |
| <input type="checkbox"/> 1 + - |  Carriage Terminology <i>An Historical Dictionary</i> Added to 3M™ CAT: 2014-05-20 | Berkebile, Don H. | Smithsonian Institution Scholarly Press | 2014-05-20 | 9781935623434 | \$74.00 | EPUB | 0 | 0 | 0 |

If you wish to alter the search parameters, you can delete individual parameters by waiving your mouse over each, and an 'x' will appear that you can click on to delete that parameter:



You will then need to click the *Update* button at the bottom of the *Criteria Builder* to make the altered search results display.

If you are satisfied with your results, you can select titles from the results list to place into your *Shop Cart*. To the right of each title you will see columns that indicate whether TRAC already owns the title, how many holds are on the title (in case you wish to purchase additional copies) and whether the title is already in someone's cart:

 Add Selected to "MyCart" Cart

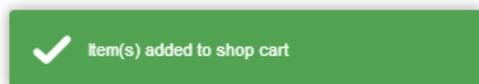
1-8 of 8 Results



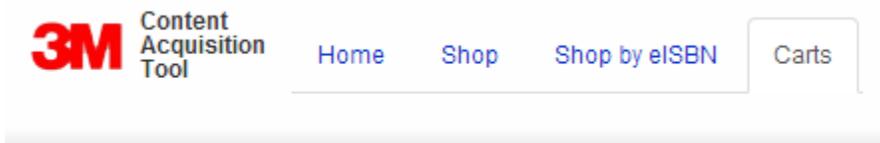
| Quantity | Title | Author | Publisher | Publication Date | eISBN | Price | Format | Owned | Hold | InCart |
|---|---|-------------------|--|------------------|---------------|---------|--------|-------|------|--------|
| <input checked="" type="checkbox"/> 1   |  Auto Biography <i>A Classic Car, an Outlaw Motorhe...</i> Added to 3M™ CAT: 2014-05-06 | Swift, Earl | It Books | 2014-05-06 | 9780062282675 | \$21.59 | EPUB | 0 | 0 | 0 |
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Click the checkbox to the left of each desired title, and then click the blue *Add Selected to "MyCart" Cart* button.

At the bottom right of the screen you will see a momentary message that you've added titles to your order cart:



To view what you've put in your Shop Cart, click on the *Carts* button at the top of the screen:



Your own *MyCart* will appear, displaying the titles you have put in it.



You can manage the contents of your Shop Cart:

- empty the entire Shop Cart by clicking *Clear Cart*



- or select the checkbox to the left of a title, which will cause these buttons to appear:

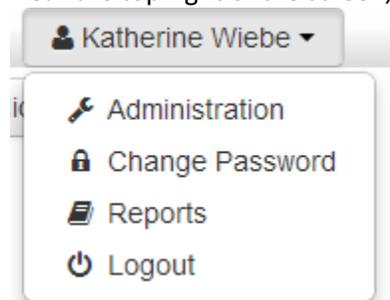


Reports to Help with Ordering

****You must allow pop-ups for the Reports feature to work.****

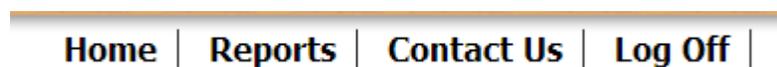
Running a Wish List

Near the top right of the screen, click the pulldown menu that has your name on it and select *Reports*:

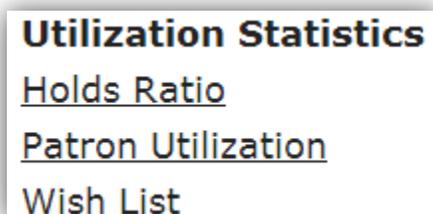


When patrons search 3M for titles to read, they can search Titles held by the Library or All Titles potentially available for TRAC to purchase. If patrons choose to search titles available for purchase and then click on a title TRAC has not yet purchased, it will be entered into the Wish List report. Libraries purchasing titles may wish to consult this report to help with ordering selections.

Various graph charts may appear on the screen; click on the *Reports* button at the top of the screen:



From the menu that appears, under the Utilization Statistics, select the Wish List:



Regrettably, the Wish List that generates in 3M is not clickable, in that you cannot just click on a title to automatically place it into your Shop Cart. Instead, you will have to manually search for the title as explained on page 1 and insert it into your Shop Cart.

Click the green *Search* button...

Wish List

| | | | | |
|-------------------|-----------------------------------|---------------|------------------------|---|
| Publisher: | All Publishers | Search | Export to Excel | ? |
| Content Provider: | All Content Providers | | | |
| Library: | TRAC The Regional Automation Cons | | | |

The Wish List Report displays. You can sort the columns by clicking on the header of each column:

| Title | Author | eISBN | Publisher | Current Price  | # of Patrons Put on Wishlist | Last Request Date |
|---------------------------------------|---------------------------------|---------------|---------------|---|------------------------------|-------------------|
| Four: The Transfer: A Divergent Story | Roth, Veronica | 9780062285638 | HarperCollins | \$5.99 | 2 | 4/20/2014 |
| Menage on 34th Street | Logan, Elise; Ryan-Davis, Emily | 9781426897443 | Carina Press | \$5.99 | 2 | 6/24/2014 |

| Title | Author | eISBN | Publisher | Current Price | # of Patrons Put on Wishlist | Last Request Date |
|---|-------------------|---------------|----------------------|---------------|------------------------------|-------------------|
| The Complete Murdoch Mysteries Collection | Jennings, Maureen | 9780771030062 | McClelland & Stewart | \$179.97 | 1 | 4/14/2014 |
| Sookie Stackhouse 8-copy Boxed Set | Harris, Charlaine | 9781101152171 | Penguin Group US | \$93.59 | 1 | 5/26/2014 |

You can also export the Wish List report to an Excel spreadsheet by clicking the Export button:

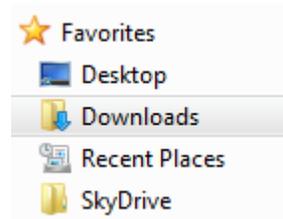


The Google Chrome browser behaves differently than Internet Explorer when downloading from the Internet to Excel:

You will momentarily see a blue arrow blink in the bottom left corner of your screen. This means the file has downloaded to Excel, but to find it:

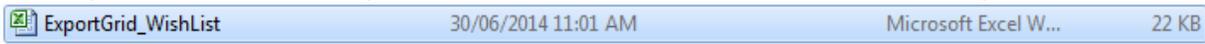


Click on your Folders icon at the bottom of your screen:



Then at the top left of your screen, select your Downloads folder:

Within your Downloads folder you will find a file with this name—this is the Excel spreadsheet:



Running a Holds Ratio

The Holds Ratio report is selected and generated the same way as the Wish List. This report shows titles currently owned by TRAC that have holds on them and how many holds each has. Libraries may wish to purchase additional copies of titles that have many holds on them.

Holds Ratio

Library: Search Export to Excel ?

| Title | Author | eISBN | Publisher | Library Name | Current Price | Patrons on Hold | Copies in Stock | # of Holds per Copy |
|---------------|---------------|---------------|----------------------------------|---|---------------|-----------------|-----------------|---------------------|
| Leaving Time | Picoult, Jodi | 9780345813374 | Random House of Canada | TRAC The Regional Automation Consortium | \$85.00 | 13 | 1 | 13 |
| Gray Mountain | Grisham, John | 9780385539166 | Knopf Doubleday Publishing Group | TRAC The Regional Automation Consortium | \$85.00 | 11 | 1 | 11 |
| Reverend | Child, Lee | 0780804178761 | Random House | TRAC The | \$85.00 | 10 | 1 | 10 |

Running a Content Expiration

Collection Data
[Circulation Comparison](#)
[Purchase History](#)
[Content Expiration](#)

Some publishers only allow libraries to purchase their titles by Metered Access, which means the titles expire after 26 or 52 checkouts. If you wish to re-purchase titles whose number of checkouts is nearing expiration, run the Content Expiration report to identify those titles.

Content Provider: 

Library: 

Checkouts Remaining: 

Search **Export to Excel** 

| Library Name | Content Provider | Publisher | Title | Authors | eISBN | Current Hold Count | Loan Count to Date | Current Copies in Stock | Copies Expiring | Copies Expired | After Expiration, Copies Remaining | Loans Left Before Expiring | Date Purchase | Current Sale Price |
|--------------------------------------|------------------|-----------------|--------------------|----------------|---------|--------------------|--------------------|-------------------------|-----------------|----------------|------------------------------------|----------------------------|---------------|--------------------|
| TRAC The Regional Automati Consortiu | harpercol | HarperCo | A Replacem Life | Fishman, Boris | 9780062 | 0 | 1 | 1 | 1 | 0 | 0 | 25 | 6/9/2014 | 22.99 |
| TRAC The Regional Automati Consortiu | harpercol | HarperCo Canada | American Innovatio | Galchen, Rivka | 9781443 | 0 | 1 | 1 | 1 | 0 | 0 | 25 | 9/26/2014 | 21.99 |

Submitting your Shop Cart for Purchase

1. Because all the libraries in TRAC are under one account for "TRAC", it is not possible to give each library permissions to purchase carts.
2. When you are ready to have your cart purchased, contact Katherine Wiebe at kwiebe@peacelibrarysystem.ab.ca or at (780) 538-4656, x. 103; or 1-800-422-6875, and advise her to purchase your cart.
3. Katherine will send you an email when she has done so. Your allotment account will not show the purchase immediately, as it will not be deducted from your allotment until after PLS has received the invoice from 3M. PLS receives invoices from 3M once a month.
4. If you have any questions about 3M ordering, please contact Katherine (see point 2).