



# Cloudlibrary Ordering & Patron Management Procedures

For Public Libraries

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## What's cloudLibrary?

cloudLibrary is our primary eBook platform. It follows the physical checkout model – so one patron can check out a particular copy of an eBook at a time. To allow more patrons to access a title simultaneously, we must purchase more copies of it.

## Log On

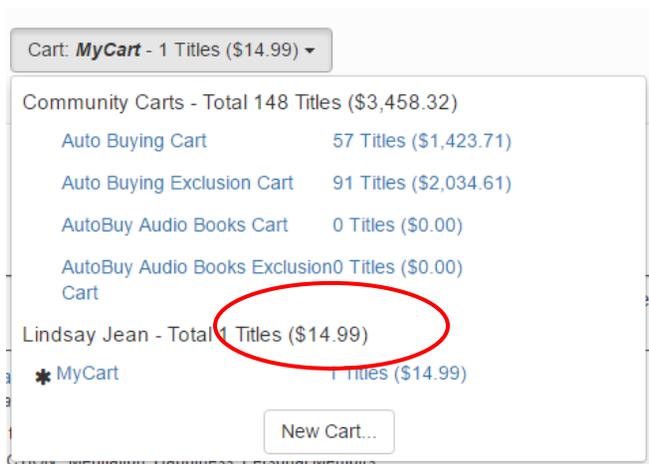
1. Go to the cloudLibrary ordering site at [cat.yourcloudlibrary.com](http://cat.yourcloudlibrary.com).
2. Log in with your username and password (ask your Acquisitions account manager for a login).

## Carts

To order items in cloudLibrary, you will add them to a cart. cloudLibrary provides you with a default cart called MyCart. You can use this cart or create multiple carts for different categories (e.g. mystery, junior, etc.) or for different staff (e.g. Jane, Alex, etc.)

### Create a new cart

1. Click on the *Carts* tab at the top of the screen. In the *Cart* dropdown menu, click *New Cart*.
2. Name your cart in the *Short Name* field. Do not use spaces or special characters. You can leave the other fields blank. Do not check Community Cart.



3. Click *Save*. Your new cart is now ready to have items added to it.

### Delete a cart

If you wish to delete a cart:

1. Click on the *Carts* tab at the top of the screen. Click on the *Cart* dropdown menu.
2. Hover your mouse over the cart you want to delete.
3. Click the *x* button.

Cart: **Lindsaycart** - 0 Titles (\$0.00) ▾

Community Carts - Total 148 Titles (\$3,458.32)

- Auto Buying Cart 57 Titles (\$1,423.71)
- Auto Buying Exclusion Cart 91 Titles (\$2,034.61)
- AutoBuy Audio Books Cart 0 Titles (\$0.00)
- AutoBuy Audio Books Exclusion Cart 0 Titles (\$0.00)

Lindsay Jean - Total 1 Titles (\$14.99)

**Lindsaycart** 0 Titles (\$0.00) ✎ ✕

MyCart Lindsaycart \$14.99

New Cart...

## Finding Items

### Browse Lists

cloudLibrary provides lists of top new releases in Canada and the U.S., top titles that circulated to all cloudLibrary libraries in the previous month, and more. These are featured on the homepage, like this:

The screenshot shows the cloudLibrary homepage for Parkland Regional Library. At the top, there are navigation tabs for 'Content Acquisition Tool', 'Featured', 'Search', and 'Carts'. Below this is a horizontal menu with various list categories like 'CA Top New Releases', 'US Adult Fiction Top New Releases', etc. The main content area features a 'CA Top New Releases 4/18/16-4/22/16' section with a grid of 17 book covers. Each cover includes the title, author, and price. A 'List View' button is visible in the top right corner of the book grid.

*Note: You can find the lists from anywhere on the cloudLibrary ordering site by clicking the **Featured** tab.*

If you wish to order from one of the current lists:

1. Click on the *List View* button.
2. Choose how you want to sort the list by clicking the *Sort by* drop down menu. The default sort setting is alphabetically by title.

This close-up shows the top right corner of the book list interface. It displays the text '17 total titles, last modified: 2016-04-22' followed by a 'List View' button, which is circled in red. Below the button, the top edges of several book covers are visible.

*Note: Once a list is in List View, you will be able to see more details about each item on the list, including:*

Owned 1	Cart 0
Holds 5	Ordered 0
All Loans 1	Shelved 1
In Circ. 1	
Suggested 0	

1. The number of copies currently owned by the entire Parkland system (Owned).
2. The number of holds on the current copies (Holds).
3. The number of checkouts (All Loans).
4. The current number of patrons who have the title checked out (In Circ.).
5. The number of patrons who have added this title to

their wishlists (Suggested).

6. The number of copies that have been added to carts, but aren't yet on order (Cart).
7. The number of copies currently on order (Ordered).
8. How many patron app shelves the title is currently active on (Shelved).

*This information will help you determine whether you want to order a copy of a title.*

Once you've found an item you want, you will need to add it to your cart.

1. Click on the checkbox next to the titles you wish to purchase (so there is a checkmark next to each one).
2. Click on the blue *Add Selected* button to add them to your currently selected cart. (Make sure the cart you want to add the item to is selected.)



The screenshot shows a library catalog interface. At the top, there is a blue button with a shopping cart icon and the text "Add Selected to Cart: MyCart". A red arrow points to this button. Below the button, there is a book item card for "13 Under the Wire" by Gil Reavill. The card includes a book cover image, the title "13 Under the Wire", the author "GIL REAVILL", and the subtitle "A Layla Remington Novel". It also shows the date "Added to CAT 2016-03-21", the genre "FICTION : Police Procedural; Women Sleuths; Crime", the language "English", and the edition "Edition DigitalOriginal". The provider is listed as "Provider - randomhouseus". At the bottom of the card, there is a checkbox with a checkmark and the number "1", which is circled in red.

## Search for Titles

Looking for a specific author or title? Click on the *Search* tab. Then input your search terms.

Quick Search Keywords

Title

Author - author 1;author 2

eISBN - 13 digits

When you find a title you want, click on the checkbox next to it, and then click on the blue *Add Selected* button to add it to your currently selected cart.

## Auto Carts

Another great way to find titles to purchase on cloudLibrary is through the Auto Buying Carts. These carts are shared among all PRL cloudLibrary accounts, so all libraries will see the contents of the carts. There are three carts, populated with titles that have recently expired, have a high number of holds, or have been suggested by patrons using the patron wishlist. Use discretion if selecting from the items that have expired. They may have had a time limit instead of a maximum amount of checkouts, or may be dated enough to let them expire.

To use the Auto Buying Cart:

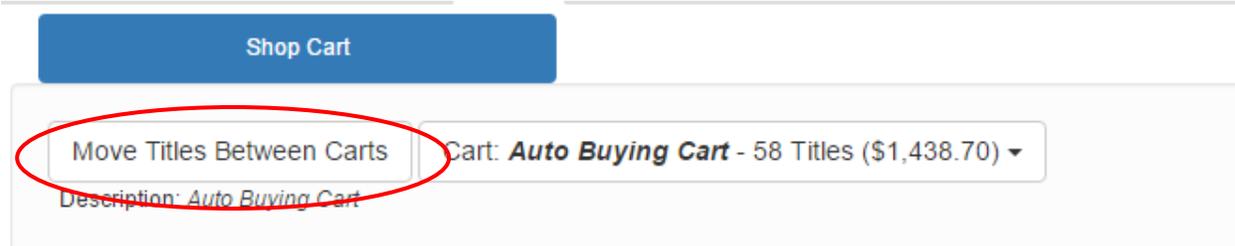
1. Click on the *Carts* tab at the top of the window.
2. Click on the *Cart* dropdown menu and select the Auto Buying Cart you are interested in using.
3. Browse the list of titles in the Auto Buying Cart.
4. When you find an item in the Auto Buying Cart you want to purchase, click the checkbox next to the item. Selected items will change to a light blue background.

	Featured	Search	Carts
	Auto eBook ContentExpiration	124 Titles (\$2,377.35)	
	Auto eBook HoldRatio	10 Titles (\$694.98)	
	Auto eBook Suggestions	22 Titles (\$559.59)	

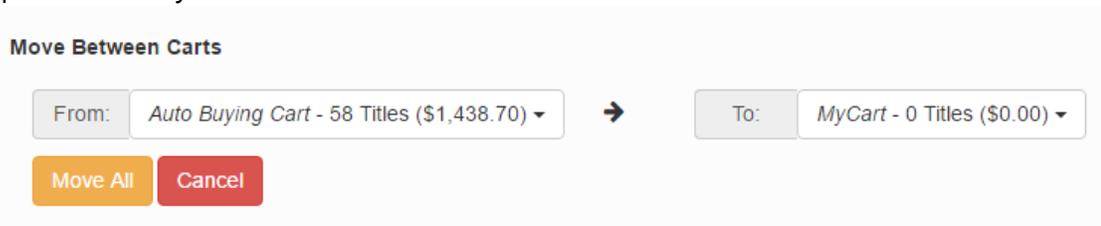
  

	<b>10% Happier</b> How I Tamed the Voice in My Head, Reduced Stress Without Losing My Edge... Added to CAT 2016-04-26 NONFICTION: Meditation; Happiness; Personal Memoirs English Provider - harpercollinsus 26 checkouts	N/A	Harris, Dan	Dey Street Books	2014-03-10	9780062265449	\$14.99	Owned 0 Holds 0 All Loans 26 In Circ: 1 Suggested 5	Cart 1 Ordered 0 Shelved 0 Content Expiration
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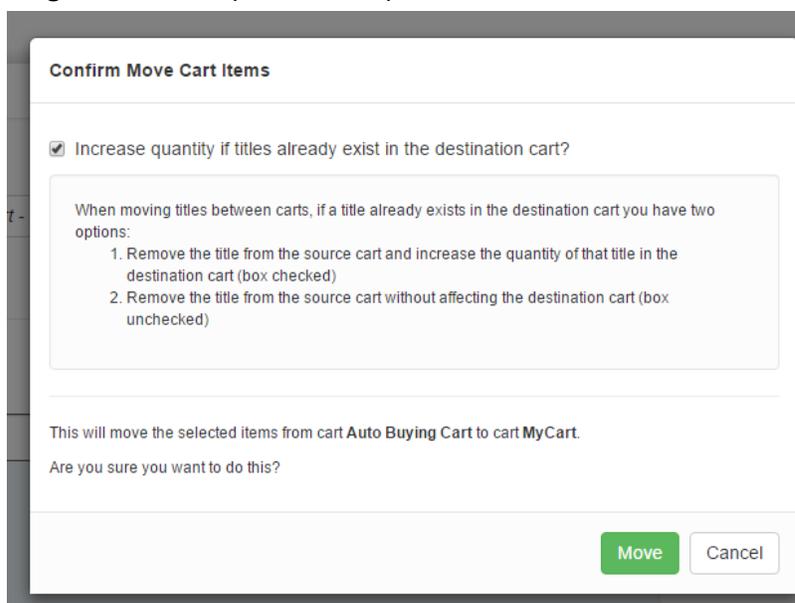
5. To move the items to your cart, select *Move Titles Between Carts*. Leave the Auto Buying Cart selected in the *From* field and change the cart in the *To* field to the cart you want to move the items into.



6. You can choose to move all the items by clicking the orange *Move All* button or select the item(s) you want to purchase by clicking the checkbox next to it. If you have selected specific items, you will see a blue *Move Selected* button.



7. A pop-up box will appear asking you to confirm the move. Click *Move*. The items moved will move out of the Auto Buying cart and into your own cart, at which point you can purchase through the PRL acquisitions department.



## Circulation Restrictions

Some eBooks have restrictions imposed by the publisher. An example of this is HarperCollins. Any copy of an eBook published by HarperCollins may only be checked out 26 times (after which the library will no longer own that copy of the book; it must be re-purchased to keep it in the collection).

All titles with restrictions will have a blue circle with an "i" in it and details about the circulation restrictions.

## Removing Items

Click on the *Carts* tab and select the cart you want to see from the *Cart* dropdown menu.

1. Click the checkbox by the item you want to remove.
2. Click *Remove Item(s)*.

## Ordering

To order your cart submit the *Library MARC Order Cart* form on the PRL support site (<http://support.prl.ab.ca/order>)

When PRL's acquisitions department processes your order, they will download the cart and delete it. They will then email you to let you know that your order has been processed.

*Note: Any items you pre-order will be made available to patrons once they're published.*

## Pricing

Prices for cloudLibrary titles are all given in Canadian dollars.

## Statistics

Parkland will provide statistics on a monthly basis for cloudLibrary and other eContent platforms. This information is saved on the Q drive in the Statistics folder.

## Patron Management

cloudLibrary patron management allows library staff to change a patron's barcode (e.g. when they get a new card) or bump a patron to the top of the hold queue (e.g. when a patron loses their hold due to technical difficulties.)

1. Go to the cloudLibrary ordering site at [cat.yourcloudlibrary.com](http://cat.yourcloudlibrary.com).
2. Log in with your username and password (ask your Acquisitions account manager for a login).

Parkland staff can also update the patron's barcode or reorder the hold queue for those libraries that don't want a cloudLibrary ordering site login. The form is available at <http://support.prl.ab.ca/index.php/forms/cloudlibrary-form/>.

Keep in mind that there may be a delay between when you submit the form and when PRL staff are able to make adjustments.

Questions? Contact your PRL consultant or acquisitions.