COORDINATED COLLECTION DEVELOPMENT (CCD) TOOL INTRODUCTION

Peace Library System
Yellowhead Regional Library
Northern Lights Library System

Contents

What is the CCD Tool?

The CCD Tool is one way for Library Staff to order materials for their collection. The CCD Tool was initially developed by Yellowhead Regional Library so that their members could quickly and easily order from the most popular selection lists. In 2022 they started to work with Peace Library System and Northern Lights Library System to incorporate our libraries into the Tool.

The Tool provides you with lists of titles in various formats, including hardcover, paperback, large print, or audio/visual. You can look at each title and find out a detailed description of items as well as seeing the cover art and extra information.

The CCD Tool is specifically built around TRAC's specific circumstances. That is, the CCD Tool continually talks with Polaris to get information such as your Funds and Library collections. This allows the Tool to show you each of your Funds as you browse lists of new and upcoming titles from our most popular vendors. You can also see if your library currently owns a title, or if another library in TRAC owns the title, allowing you to make an informed purchase decision.

Peace Library System wants to hear your feedback about the tool. Please contact the Collection Services Manager for any and all suggestions on future developments, additional selection lists or vendors, or other comments.

We are excited to provide you with access to the CCD Tool, and we believe it will be convenient for much of your ordering needs. But, please remember that there are several ways for you to submit orders to Peace Library System, including sending us carts from vendors or our Order Form.

Accessing the CCD Tool

In order to access the CCD Tool you need to be registered with a User Account. All Peace Library System member and partner Library Managers receive permission to use the CCD Tool. If you do not have a login or are unable to use the current username/password please contact ordering@peacelibrarysystem.ab.ca. Please also reach out to us if you have additional staff who do ordering for your library and who need their own account.
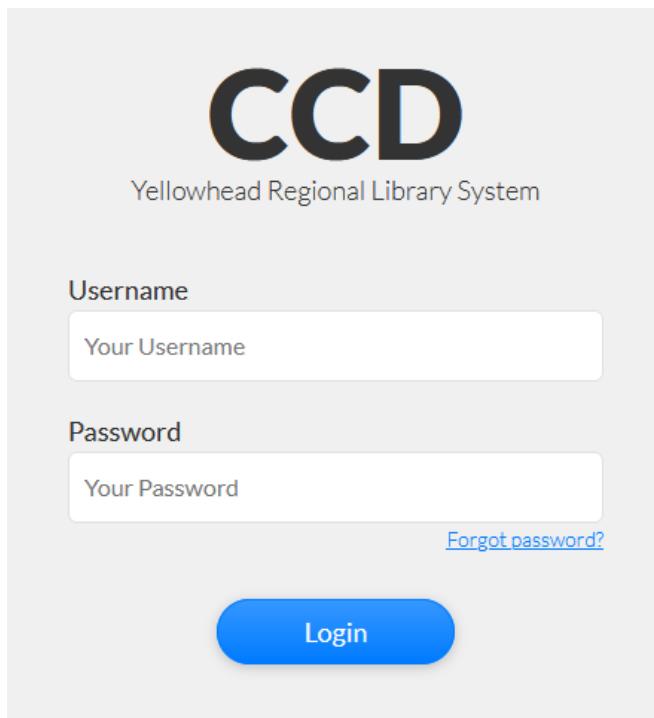
To log into the CCD Tool go to the website at: https://ccd.yrl.ab.ca/

For Public Library Managers and staff with permissions: enter your Polaris username and CCD password into the user login box.

For School Library Managers: enter "pls" followed by your national library code and CCD password into the user login box.

Tips and Notes

If you have any questions or concerns please reach out to ordering@peacelibrarysystem.ab.ca, or contact the Acquisitions Specialist or Collection Services Manager.

- Please keep the Carts filled with just one kind of Selection List. Super Forthcoming can be mixed with other Super Forthcoming, but separate from Hotlist, for example.

- Please put the name of the Selection Lists included in your Cart into the Notes. Also include who is authorizing the purchases.

- Please make note of the Expiry Date of the Selection Lists and Titles you are adding to your Cart

- Contact Peace Library System if you require a new account. Please also let us know if an account can be archived.

- You can only work with one Fund and one Cart at a time.

- You can log out and log back in and your Cart will still be there.

- You can reset your password at any time by selecting "Forgot password?" on the login page.

- Discounts may vary and final costs will be known upon invoicing.

Navigation

Upon successful login to the CCD Tool interface you will see four navigation tabs. These tabs will take you through the various phases of placing an order in the Tool as you select, create, and submit your order. Please note that "My Order" is Right Justified, and will appear on the far right side of your browser window.
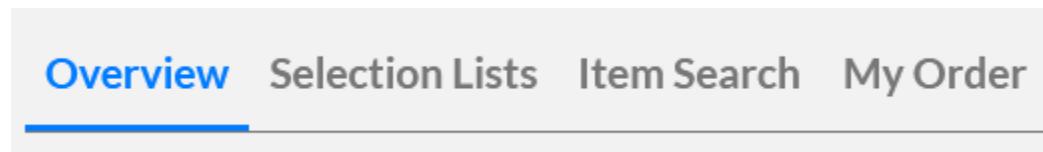
Overview

Overview allows you to see what Fund(s) accounts are available to you. This includes the Fund Name, Balance (current balance in fund), Minus Pending (amount of funds remaining in an account while an order is in progress), Encumbered items (number of items on order for that fund), and Encumbered (dollar amount of funds allocated for items on order).

Lower down you can see your Order History.

When a Fund is selected it will appear at the bottom of your screen. This will follow you as you navigate the Tool, and will update as you add items to your cart.

Selection Lists

Selection Lists allow you to review the titles currently available for ordering. You can search, sort, or filter the lists.

New Selection Lists are regularly created and are only available for a limited time. Please check the Tool somewhat regularly to find new Lists that may interest you. Peace Library System intends to inform you when some of the more notable Lists are created, such as the Hotlist.

Please let the Acquisitions Specialist or Collection Services Manager know if there are Selection Lists you would like to see added to the Tool.

Each List will have a description, category, discount, and the number of items within the list. Please note that Discounts are predictions. Actual discount percentage may vary and will be applied upon invoicing from the vendor.

Upon entering a Selection List you will have the opportunity to scroll through titles. The cover art and the list price for each item are readily visible as well as the item's regular bibliographic information and its availability within TRAC.

Please note the icons below the cover art, which will let you know if the title is in the collection for your library, a Yellowhead library, a Peace library, a Northern Lights library, and/or a TRAC library in general.
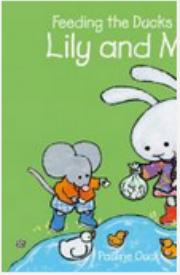
Feeding the Ducks with Lily and Milo
Oud Pauline.
Hardcover   ISBN 9781605378497   ◔ May 31, 2023
Feeding ducks at the park is so much fun! There's a big pond with ducks, a playground, a sandpit and so much more!

Discount 35%
Save $7.87
$22.50 **$14.63**
QTY ◌   **Add**

❌ Own ❌ YRL ❌ PLS ❌ NLLS ❌ TRAC
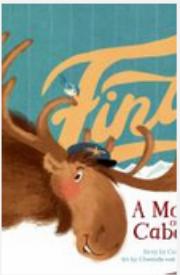
Finley A Moose on the Caboose.
Spizzirri, Candace.
Hardcover   ISBN 9781957655031   ◔ May 31, 2023
Friendly moose Finley longs for an Alaskan adventure, but "rules are rules" and wild animals aren't allowed on the train. No matter the disgu...

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Save $8.73
$24.95 **$16.22**
QTY ◌   **Add**

❌ Own ✅ YRL ✅ PLS ❌ NLLS ✅ TRAC

Flashback to the . . . Awesome '80s!
Michaels, Patty.
Hardcover   ISBN 9781665933476   ◔ May 31, 2023
Explore the trends, fashion, technology, and inventions of the 1980s

Discount 35%
Save $8.40
$23.99 $15.59

If you want to know more, click on the cover art or title. You will be taken to a page about that individual title, which will include information from Polaris, current Holdings, Linked Data information which may include reviews or summaries, and a MARC Record. Please be aware that many records will be On-Order Records, and will not be representative of the information created by TRAC Cataloguers.

To add items to your Cart you will need to change the Quantity (QTY) information by a title. You can add titles individually, or select the quantity of each title and then press the "Add All to Order" button on the page. You can add titles from their individual page or the Selection List page.

To go back to the Selection Lists either use the Back arrow button on your browser, or look for "Return to Selection List" and "Return to Selection Lists" on the top right portion of the page.

Please note that you can only have one Cart in progress at a time. You can log out and log back in and your Cart will still be there, unless the titles Expire.

Selection Lists and the Titles within have an Expiry Date.

Please submit your Cart before the Expiration Date, or the Titles will show as 'Expired' and you will not be able to submit it.

When filling Carts please keep Selection Lists separate. Peace Library System has separate Vendor Accounts for Hotlist, Super Forthcoming, and other kinds of Titles. This allows us to identify them when being received and prioritize (Hotlist is highlighted and processed before Regular orders, for example). Please also identify which Lists are in your Cart so we can use the proper account. So, you can mix multiple Super Forthcoming Lists, but we ask that you keep those separate from Hotlist selections, Graphic Novel selections, etc.

Item Search

Search allows you to find individual titles included on current selection lists. You can search by ISBN, UPC, Author, or keyword.

There are various options to filter or sort the results.

If the item you are looking for does not appear in the Selection Lists or the Search, you can use the Tool to request a specific title.
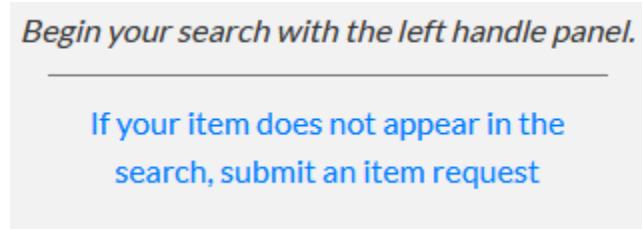
A popup will appear that lets you input information which will be submitted to Peace Library System staff.

Please fill out as much specific information as you are able to. You can also provide Notes such as "must be hardcover" or "hardcover or softcover acceptable".

Please remember that the CCD Tool is not the only way to submit orders to Peace Library System. You can request items similarly with an email to ordering@peacelibrarysystem.ab.ca, or other methods you may have used in the past such as sending your United Library Services cart to us. However, the Request Item feature in the CCD Tool is a convenient place for you to submit orders for titles as well.

My Order

You can add many items to an order, but for ease of use it is good to do orders in smaller amounts. This allows you to easily scroll the list of titles you have placed on order and add and remove items as necessary. As you scroll the order you can see the quantity of items for a certain title and also the list price.

If you want to take a title off of your order click "Remove" and there will be a popup confirmation on your screen temporarily. If you want to update the quantities on order, change the amount in the quantity box and "Update". A popup confirmation will appear temporarily on your screen.

Once you have gone through your order and feel it is ready to go, you can Submit Order. At this point, the Order Summary will display and you will be given the opportunity to finalize your order. Please review the section on the left in particular.

Ensure that the correct Fund is selected. Enter a P.O. number if you wish. Please include any Notes you can, including which Selection List you ordered from and who is authorizing the purchases.

Importantly, we highly recommend you keep a record of your order by selecting "Download as CSV" and saving the file to your computer. This is useful both for you in case you need to review orders you have submitted in the past, as well as for Peace Library System staff in case we need to confirm information from your order.

Once you are finished reviewing the order and have your CSV copy you can submit it. You will be given a notification that your order was successfully submitted. Your Cart should now clear and you can begin a new order or Log Out for now. Peace Library System staff understand that sometimes the cart may not clear, however pressing "Submit Order" a second time will not create two orders.

When your order is received by Peace Library System staff it will be reviewed. If we have any questions a staff member will contact you. Once the order is marked as "Approved" you will receive a confirmation email.

Please be aware that Peace Library System staff need to enter your CCD Tool orders into Polaris. Please allow for 24-48 hours during the regular business week for this information to be input. This means that when you Submit an Order the Fund information will not be immediately updated to reflect the new Encumbrances.

Log Out

When you have finished all of your selections and orders and are ready to leave the CCD Tool, remember to log out so that your session closes completely.

Polaris Synchronization

When the TRACPac Polaris system is running in real-time, the CCD Tool should display the correct fund balances as well as the status of titles within Polaris. This synchronization allows for proper coordination of selection tool titles so that the Library Manager can be confident that the library owns a title already, a title is on order, how much funds are left in an account, etc. Matching points for title identification include ISBN or UPC codes, so a title issued under a different ISBN may not register as a match to a locally owned item.

For school libraries that do not use TRACPac Polaris to circulate their library materials, you will not be able to confirm if the school library already owns an item or not. You will need to check your local library system to see if the title is already a part of the school collection.

When Polaris is offline, the above information will not be available.

Please contact ordering@peacelibrarysystem.ab.ca, the Acquisitions Specialist, or the Collection Services Manager if you have any concerns or questions regarding the CCD Tool.