

Operational/Management Functions of OverDrive Marketplace

The MHLS OverDrive service was established in 2010 and has proved highly successful as measured by patron demand. Each year circulation has increased, with 386,340 circulations in 2019, a 25% increase over the previous year.

HOW ARE MY PATRONS USING OVERDRIVE?

1. Review [monthly report of OverDrive statistics](#) containing OverDrive eBook, eAudio, eVideo, unique users, and total circulation updated monthly by MHLS. The report shows monthly usage stats for the current year, broken down by patron type, along with annual totals for each library for trend comparison.
2. Know what titles your patrons have on hold that are in high demand:
 - a. Through OverDrive Marketplace Reports at <https://marketplace.overdrive.com> you can run a **Current Holds** report on the titles that patrons from your library are currently on the waiting list for, so you know what your patrons are interested in.
 - i. Click on the title of the item to go to the Title Details Page. Note the holds ratio for consortium owned copies, so you know how long your patrons could be waiting for their holds from the consortium collection if you do not purchase an Advantage copy.
 - ii. For more information refer to [Understanding "Own," "Out," "Holds," "Holds ratio," and "Pending" numbers in Marketplace](#) in OverDrive Marketplace Help.
 - b. In OverDrive Marketplace you can also create a Holds Manager plan that will build a cart for you based on parameters you set for your patrons high demand holds, that you can review and edit. In OverDrive Marketplace you can also use a Holds Manager plan that will build a cart with your patrons' high demand holds based on parameters you set.
 - i. For more information refer to [What is Holds Manager and how do I use it](#) in OverDrive Marketplace Help.
3. Know what titles your patrons have on hold that are soon to be weeded:
 - a. Each week, OverDrive generates "OD metered alert" carts with any titles that are approaching the end of their access period or have few checkouts remaining. Review the **Adv active holds** column to check for holds that may not be fulfilled for your patrons and consider repurchasing titles that may still be in demand.
 - b. Metered titles with no checkouts remaining are weeded automatically each morning, and if a new copy is not repurchased, any holds will be canceled after the first of the following month.
 - i. If you wish to repurchase something that has been weeded, please send a message to the MHLS Overdrive account administrator (nacosta@midhudson.org) to have the title added back to the collection.

4. Know what your patrons are requesting for purchase:
 - a. As per the DA, in March 2017 the built-in OverDrive feature 'Recommend to Library' was enabled so that patrons would be able to recommend OverDrive titles for purchase, and libraries may review the recommendations in their advantage accounts.
 - b. In OverDrive Marketplace you can run the **Recommended titles** report to review your users' recommendations, and easily convert them to a cart that you can review and edit.
 - i. For more information refer to [How to run a "Recommended titles" report for your Advantage collection](#) in OverDrive Marketplace Help.
 - c. In OverDrive Marketplace you can also create a Recommend to Library (RTL) Manager plan that will build a cart with your patrons recommendations based on parameters you set.
 - i. For more information refer to [What is RTL Manager and how do I use it](#) in OverDrive Marketplace Help.

PURCHASING

5. For step-by-step directions for purchasing refer to Marketplace Help at <https://help.marketplace.overdrive.com/>
 - a. Purchasing OverDrive content credit: At times (like the end of the year) you may wish to purchase OverDrive content credit to use for future spending. For more information refer to [How to purchase content credit](#) in OverDrive Marketplace Help.
6. Invoices come directly from OverDrive. Copies purchased are available for checkout within 24 hours.
7. How to get new title suggestions through the OverDrive interface
 - a. In the Marketplace Shop, the 'Must-haves' section will highlight new releases and currently popular materials.

TYPES OF ACCOUNTS

8. **Traditional:** Items/copies purchased through traditional individual accounts go into the consortium collection, to be borrowed by all member library patrons, in the order that holds are placed.
 - a. These accounts have been replaced with individual advantage accounts for most member libraries.
 - b. A traditional individual account is still used for the OverDrive Collection developed with *Central Library Development Aid (CLDA)* and *Central Book Aid (CBA) Funds* in order to give all patrons equal access to these materials.

9. **Basic Advantage:** OverDrive introduced Advantage accounts as a way for consortium members to build their own separate collections tailored for their own patrons, while still retaining access to a central consortium collection.
 - a. Basic Advantage accounts were not used by MHLS member libraries due to a lack of sharing capabilities.
10. **Advantage Plus:** In 2017, OverDrive added Advantage Plus options that allowed items in Advantage collections to be shared amongst consortium members, while giving priority to patrons of the owning library.
 - a. Nearly all MHLS libraries now have Advantage accounts. Patrons are assigned to an Advantage library based on the ptype field in their record. Patrons have access to titles in the shared collection, plus they have priority access to additional titles or copies purchased through their library's Advantage account.