

Taking Advantage: Maximizing Your Advantage Collection

Presented by your OverDrive Staff Librarians & Product Support Specialists

Rakuten *OverDrive*[®]

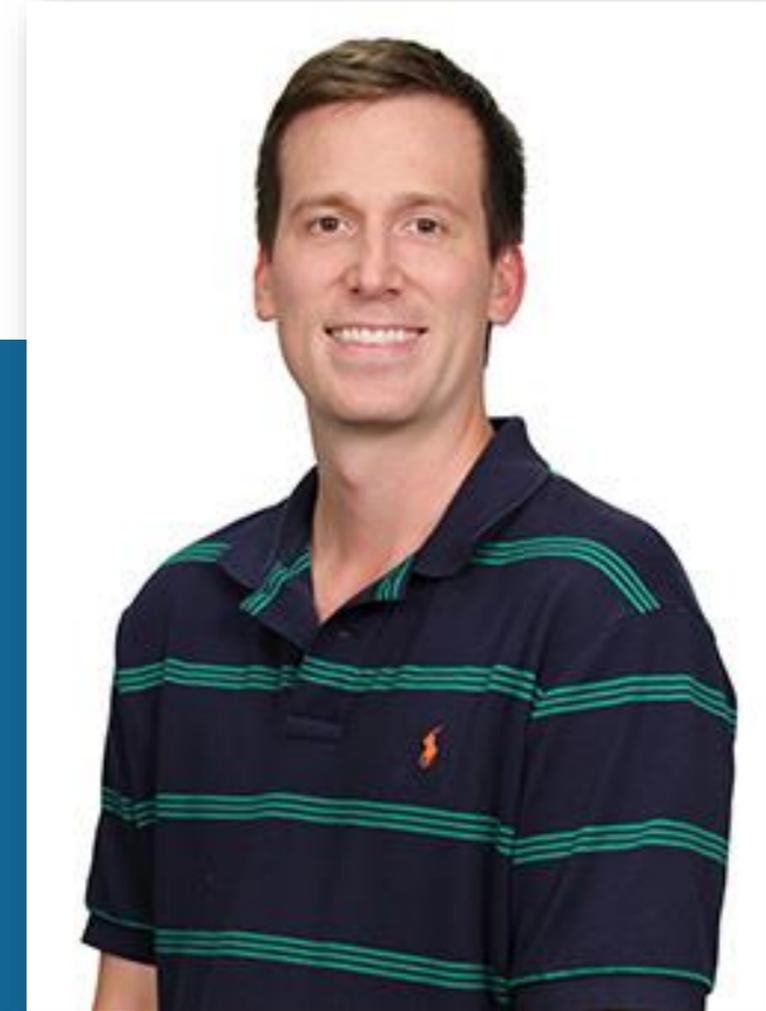
Meet your experts



Emma



Maria



Whit

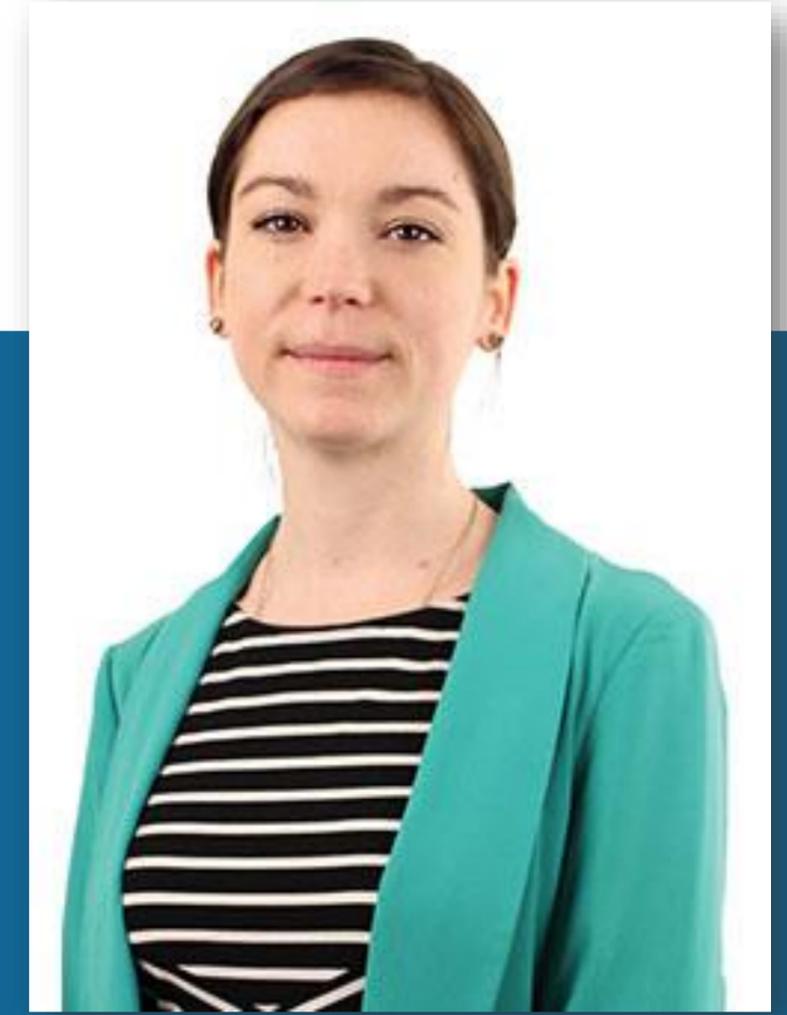
Meet your experts



Kristin



Jane



Hillary

Agenda

- Meet your presenters
- Advantage Plus
- Ordering content
- Managing demand
- Curating collections
- Running reports
- Conclusion & commonly asked questions



Find your team



Log in to Marketplace and click the Support tab.

Account Manager
Main contact
All account questions

- Contracts
- Reports
- Invoicing

Content Specialist
Collection questions

- Shopping
- Curating
- Building collections

Product Support Specialist
Technical questions

- Technical support
- Website
- MARC records

Your Account Manager



Jim Monastra
(216) 573-6886 x 1295
jmonastra@rakuten.overdrive.com

“ ”

I can help with any questions, requests, or feedback about your OverDrive service.

Your Account Team

We're also here to help with your digital collection. Contact us any time!



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Your Account Manager



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I can help with any questions, requests, or feedback about your OverDrive service.

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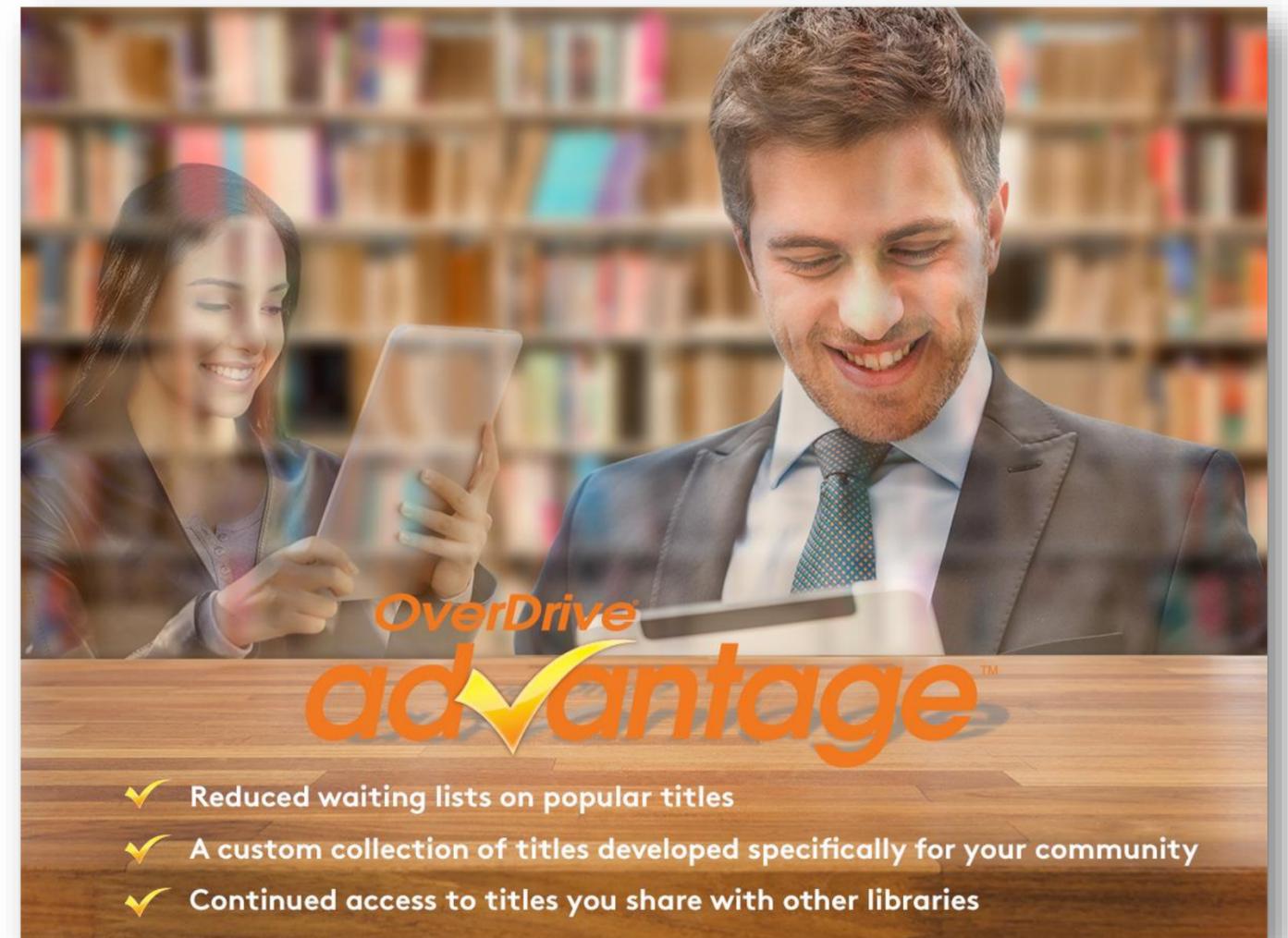
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Advantage & Advantage Plus

- + Designed to improve title selection, availability, and circulation for all members of the shared collection.
- + When a consortium enables Advantage Plus, Advantage libraries can share titles from their collection with the consortium collection, while maintaining priority on holds for their own patrons.
- + Titles are shared based on criteria chosen in an Advantage Plus plan, set up by either the consortium or the individual Advantage member, and can be customized depending on library preferences.



Advantage Plus

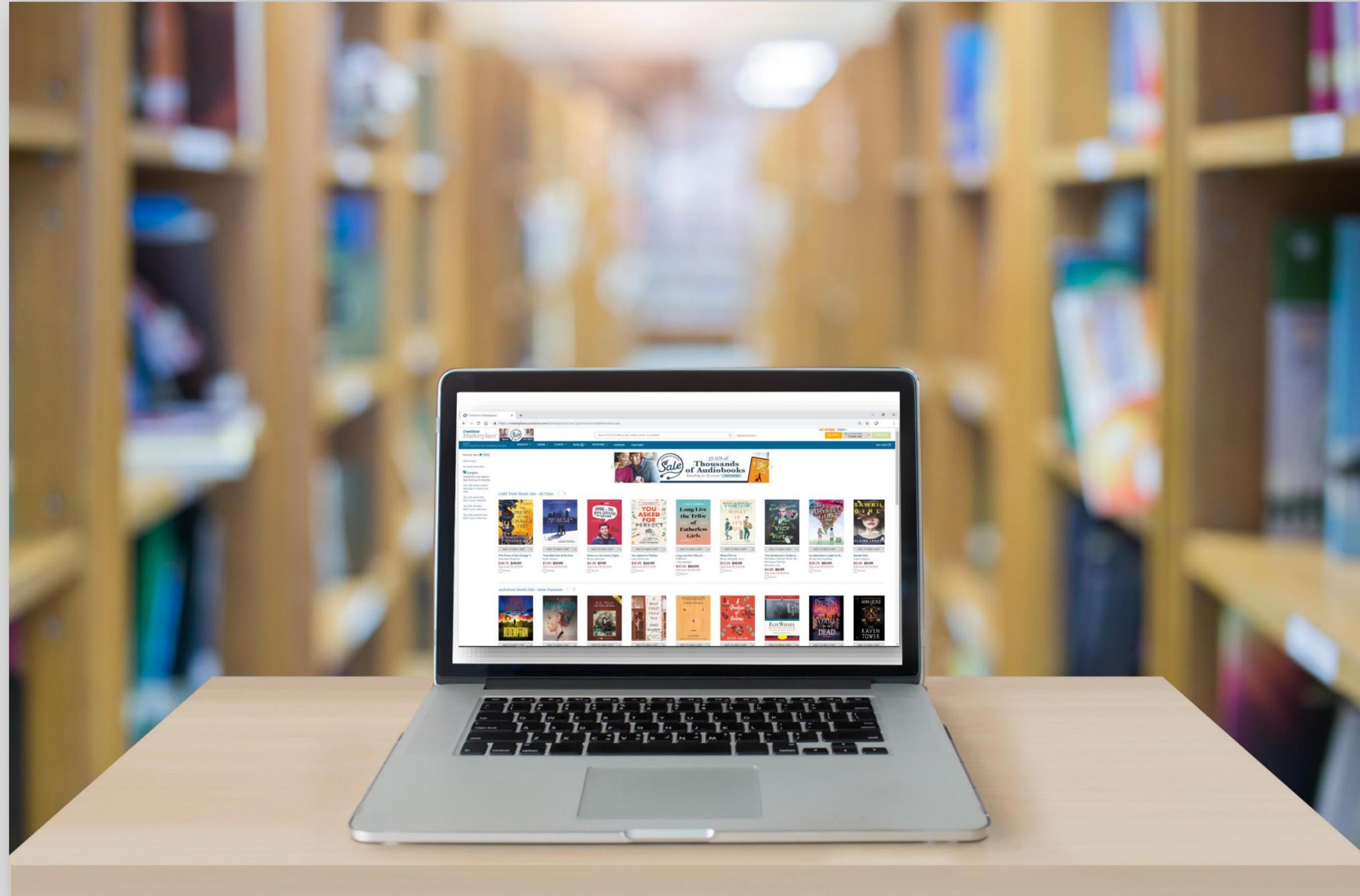
Advantage

- Purchase for your patrons only.
- Consortium patrons *cannot* borrow Advantage titles.

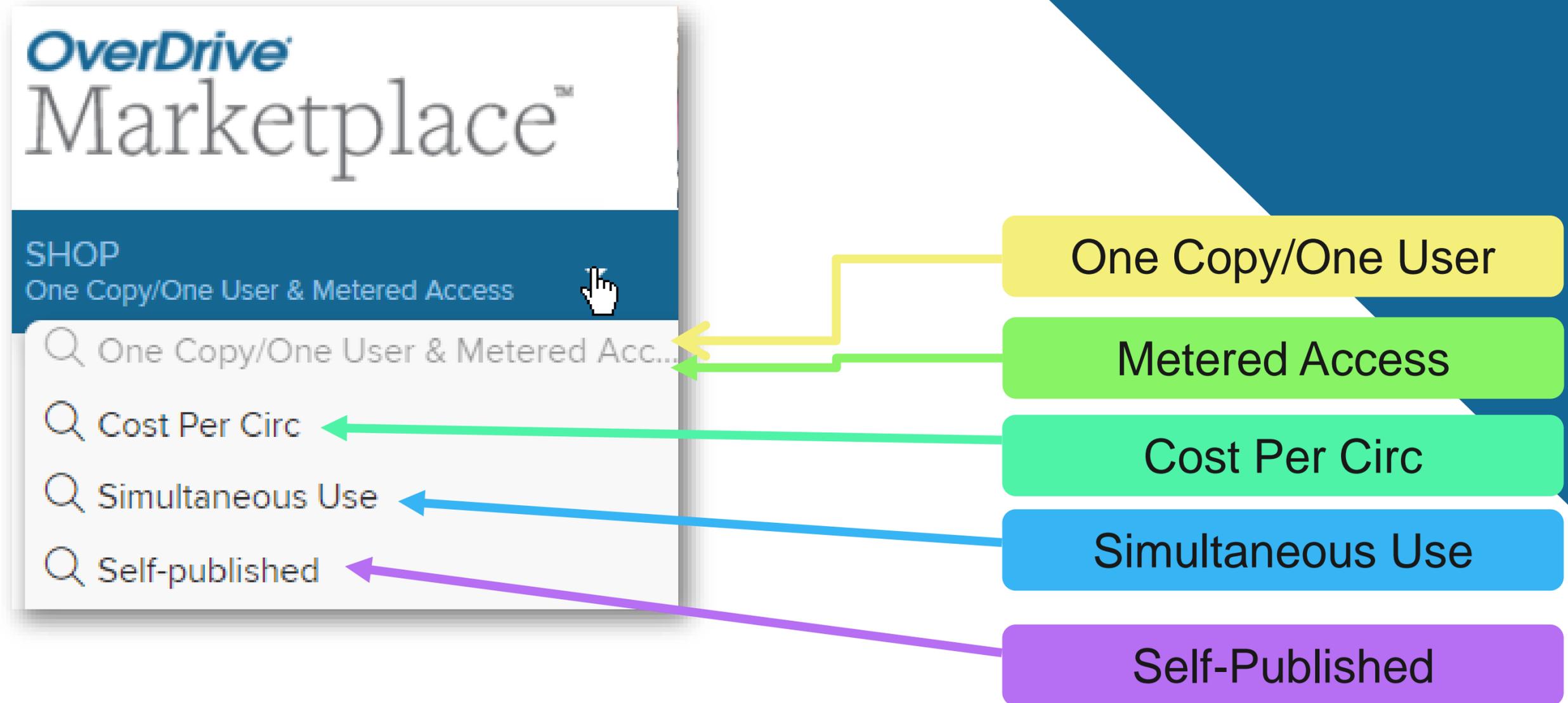
Advantage Plus

- Give priority on holds to your patrons.
- Option to share purchases with all consortium patrons.

Finding & ordering content



Lending models



Lending models

One Copy/One User

- Titles purchased one at a time.
- Titles borrowed by one user at a time.
- Never expire.

Metered Access

- Titles purchased one at a time.
- Titles borrowed by one user at a time.
- Expire after a set period of time, number of checkouts, or both.

Cost Per Circ

- Titles “added” to collection one at a time; library may be “revoke” at any time.
- Library pays only when title is borrowed.
- Titles can be borrowed simultaneously until set, customizable monthly budget runs out.

Simultaneous Use

- Titles purchased in packages for a set time period.
- Titles can be borrowed simultaneously.
- Expire when package ends.
- *Note: Project Gutenberg titles never expire.*

Find the best content: Marketplace

Featured tab

Must-haves

Insights

The screenshot shows the OverDrive Marketplace website. At the top, there is a search bar and navigation tabs including SHOP, INSIGHTS, ADMIN, CURATE, NEWS, INVOICING, SUPPORT, and FEATURED. The 'Must-haves' and 'Insights' labels are positioned over the left sidebar, which contains a 'Must-haves' dropdown menu and a list of insights such as 'OverDrive's top authors', 'Top 200 series search', and 'Top 200 adult titles'. The main content area features a banner for 'OverDrive Staff Picks Spring' with a 'SHOP NOW' button. Below the banner is an 'Easter Sale - Shop All Titles On Sale' section displaying a grid of six book covers. Each book listing includes an 'ADD TO NEW CART' button, the title, author, and pricing information.

Book Title	Author	Format	Current Price	Original Price	Sale Ends
Anxious for Nothing	Max Lucado, et al.	Audiobook	\$22.19	\$36.99	04/30/2019
The Road Back to You	Ian Morgan Cron, et al.	Ebook	\$10.00	\$19.99	04/21/2019
What a Son Needs from His Mom	Cheri Fuller, et al.	Audiobook	\$47.95		
The Path Between Us	Suzanne Stabile	Ebook	\$12.00	\$23.99	04/21/2019
No One to Trust	Lynette Eason, et al.	Audiobook	\$34.97	\$49.95	04/21/2019
Unshakable Hope	Max Lucado	Ebook	\$11.99	\$19.99	04/30/2019

Find the best content: Must-haves and Insights

Must-haves

- Content currently on sale
- Best-sellers
- Starred reviews

The screenshot shows the OverDrive Marketplace interface. At the top, there is a navigation bar with the 'OverDrive Marketplace' logo and a 'SHOP' button with a dropdown arrow. Below the navigation bar, there is a section for 'Preorder titles' with an information icon and a 'HIDE' button. The main content area is divided into two sections: 'Must-haves' and 'Insights'. The 'Must-haves' section lists several items: 'College & Career Readiness Sale - Shop All Titles', 'ICYMI from the Yay! for YA Sale', 'New Audiobooks of JUNE- updated 5.28.19', 'USA Today Bestsellers - May 24, 2019', 'NYT Kids/Teens Bestsellers - June 2nd', 'NYT Adult Bestsellers - June 2nd', 'June Starred Reviews', and 'This Week's Biggest Books - Wk of MAY 27'. The 'Insights' section includes a sub-section for 'OverDrive's top authors See what you're missing', a 'Top 200 series search See gaps in series you offer' section, and two lists: 'Top 200 Adult series' and 'Top 200 YA series'.

Insights

- Series gaps
- Collection gaps

Find the best content: Featured

The screenshot shows the top navigation bar of the Rakuten OverDrive website. The 'FEATURED' link is circled in orange. Below the navigation bar is a large banner for 'April eHighlights Adult Fiction'. The banner features three book covers: 'Boy Swallowed Universe' by Trent Lundy, 'Normal People' by Sally Rooney, and 'The Mister' by Elizabeth Strout. A blue button with the text 'CHECK THEM OUT' is positioned below the book covers. Below the banner are six content tiles arranged in a 2x3 grid. The top row contains 'HOTTEST BOOKS OF APRIL', 'STARRED REVIEWS April', and 'LIBRARY READS April'. The bottom row contains 'MARRIAGE THRILLERS', 'NON-FICTION... ...That Reads Like Fiction', and 'A BOUQUET OF BOOKS Fabulous Floral Covers'.

INSIGHTS ▾ ADMIN ▾ CURATE NEWS ⓘ ▾ SUPPORT **FEATURED**

April
eHighlights
Adult Fiction

BOY SWALLOWED UNIVERSE BY TRENT LUNDY
NORMAL PEOPLE A NOVEL BY SALLY ROONEY
The MISTER BY ELIZABETH STROUT

CHECK THEM OUT

HOTTEST BOOKS OF APRIL

STARRED REVIEWS
April

LIBRARY READS
April

MARRIAGE THRILLERS

NON-FICTION...
...That Reads Like Fiction

A BOUQUET OF BOOKS
Fabulous Floral Covers

Know when to shop: OverDrive sales & promotions

January: New Year, New You

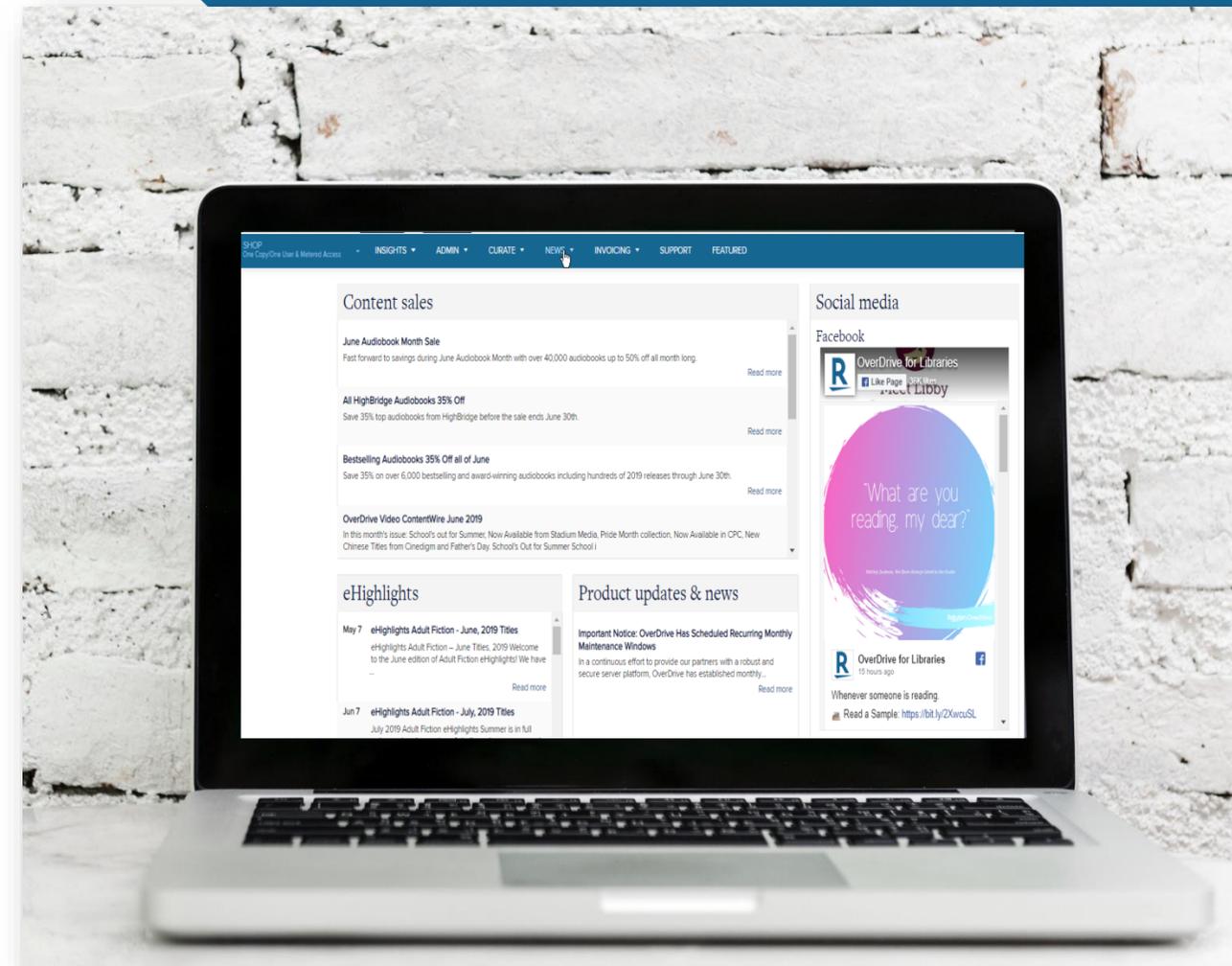
February: Romance

May: YAY for YA

June: Audiobook Month

August & September: Back to School

December: Holiday



Visit the Marketplace [News Tab](#) or the [Resource Center](#) for sale information.

Collection Development

Our Librarians create recommended lists and catalogs with the best hand-picked titles, and highlight the latest sales and promotions!

..... Recommended Lists Our Librarians

Sales & Promotions

Resource Center

Trending titles, award winners, and relevant subjects:
Resource Center > Collection Development > Recommended Lists

OverDrive Resource Center

<https://resources.overdrive.com/>

Recommended Lists

Our Librarians Sales & Promotions

This collection of lists is curated by OverDrive's Collection Development librarians and is your source for building the best collection for your community. We scour OverDrive Marketplace to find the newest, most popular, highest circulating, and interesting content. The recommended list pages are continually updated, so check back often!

Need a Marketplace username and password? Contact your OverDrive Marketplace administrator.

 Stars & Awards	 Top of the List	 Read-Alikes	 Trending Topics
 Kids	 Teens	 Staff Picks	 Seasonal/Holiday
 Genre	 Self-Published	 Streaming Video	 Canada

New!

- [Home: A refugee story – read-alikes](#)
- [Umbrella Academy + Read-Alikes](#)
- [If You Liked Shriill by Lindy West](#)
- [American Gods Read-Alikes](#)
- [Game of Thrones Read-Alikes](#)
- [Twilight Zone Read-Alikes](#)
- [Russian Doll Read-Alikes](#)
- [Bird Box Read-Alikes](#)
- [Liane Moriarty Read-Alikes](#)
- [Waiting for Fire and Blood](#)
- [Waiting for Michelle Obama's *Becoming*](#)

Managing demand



Manage holds

📄 Holds Manager

Fields marked by * are required.

User demand and budget

* Do you want to fill holds based on the number of holds or by holds ratio?
Holds ratio = holds/number of copies owned.

By holds ratio. If the holds ratio for a title is or higher, then order additional copies.

By holds. Order copies as necessary so that holds on a given title do not exceed .

* Do you want to limit how much you spend each calendar month?
Enter a whole value (ex: 20 not 19.99).

No limit; order as many copies as necessary.

Yes; I don't want to spend more than USD per month. Once this limit is reached, pause this plan for the remainder of the budget duration.

* Do you want to limit how much you spend per cart? A cart is created each time this plan runs.
Enter a whole value (ex: 20 not 19.99).

No limit (besides your monthly spending limit, if one exists)

Yes; I don't want to spend more than USD per cart.

* Do you want to limit the copies purchased for a given title?

Yes; I don't want to own more than copies of any title.

No; include as many copies as needed to satisfy this plan.

* Do you want exclude titles based on price?
Enter a whole value (ex: 20, not 19.99)

No; include all titles.

Yes; exclude titles priced more than USD.

* Do you want exclude titles that are currently pending in other carts?

No; include all titles.

Yes; exclude titles that are currently pending in other carts.

Collection development policies

* Do you want to include all formats?

Yes; include all formats.

No; include only the following formats: Ebook Audiobook Video

* Do you want to include Metered Access titles?

Yes; include Metered Access titles.

No; exclude Metered Access titles.

* Do you want to include CPC titles?
Note: Only CPC titles that you also have in another lending model will be included. Non-CPC copies always circulate before CPC.

Yes; include CPC titles.

No; exclude CPC titles.

* If a title is available in multiple Metered Access lending models:

Always add the title to my cart for my review.
Holds Manager will add the title to a cart for you to review and select the lending model you prefer.

Add the title under the model with the most amount of time or checkouts.
Holds Manager will add the title with more time or checkouts to your cart.

Recommended settings for Advantage Holds Manager Plans:

- ✓ Set a lower holds ratio (e.g., 5:1).
- ✓ Include unowned Advantage Plus Shared titles.
- ✓ Exclude non-Advantage branches.
- ✓ Exclude preorder.
- ✓ Set up format-specific plans.

Current Waiting List Report

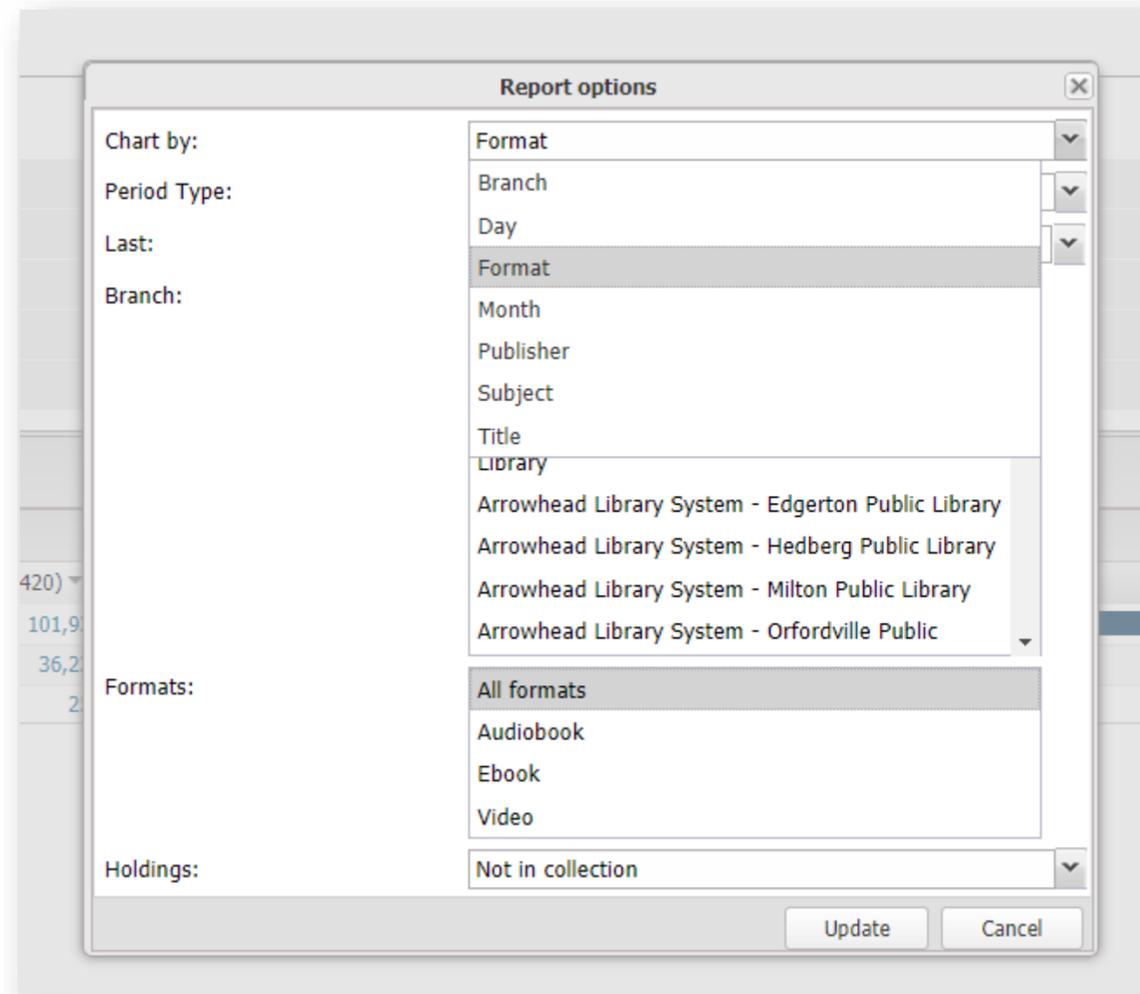
Advantage members: Always limit by branch to review the titles your users are waiting on.

Review recommendations

Readers know what they want, and recommendations are a great way to keep the collection fresh and up-to-date.

RTL Manager

- ✓ Exclude Abridged Audiobooks.
- ✓ Exclude other “branches”.
- ✓ Include preorder.
- ✓ Set up format-specific plans.
- ✓ Set a monthly limit for users.

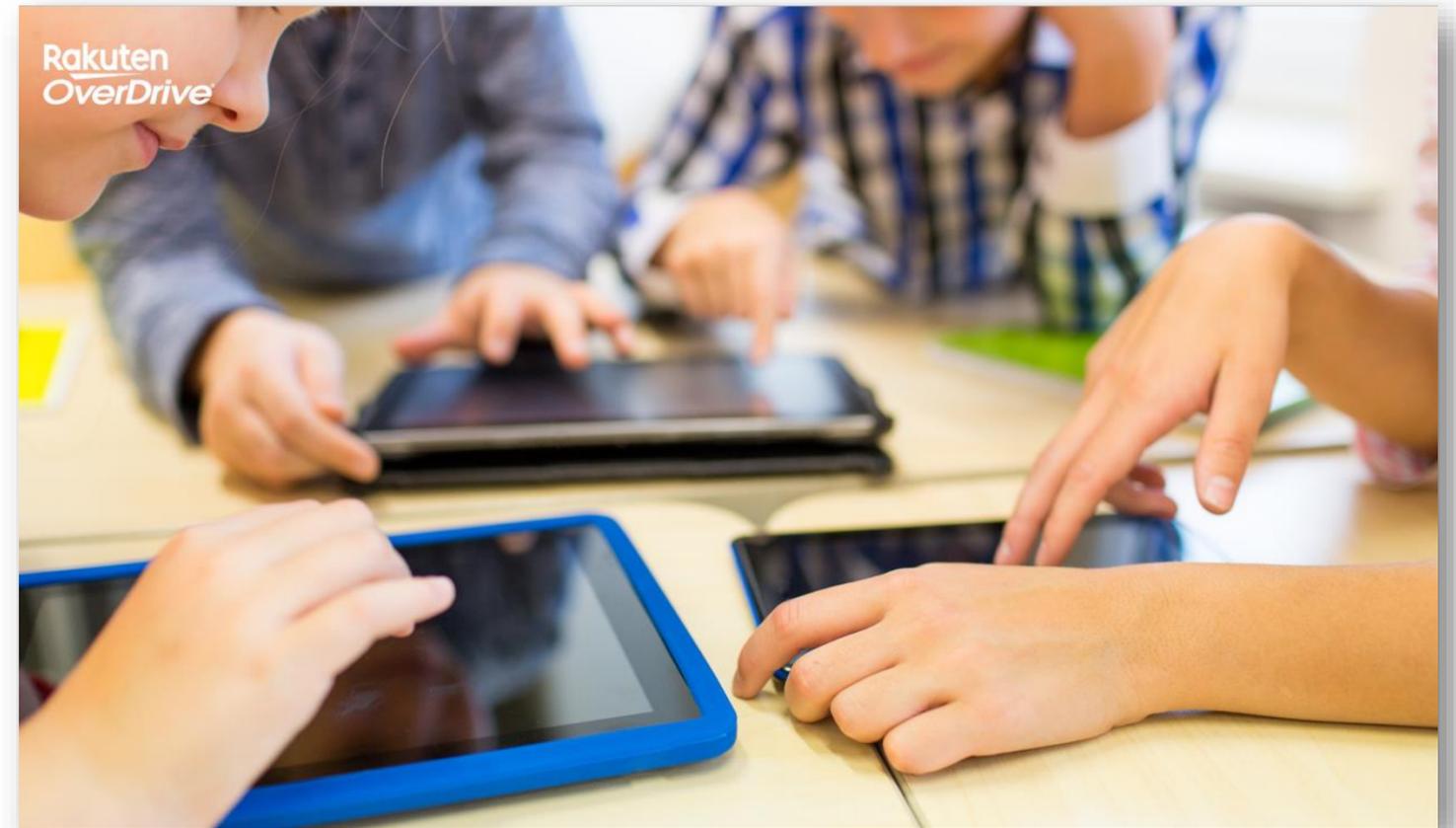


Recommended Titles Report

Advantage members can check which upcoming releases are in demand by their patrons by limiting the report by branch.

Best practices to consider: Collection development

- **Purchasing frequency:** Buying more often will help fill holds as they are placed.
- **Preorders:** Review how your library is purchasing preorder content - six months in advance? One month? No preorders?
- **Recommend to Library:** How many recommendations do you allow? How often?
- **Curation:** How often do you refresh? Who creates collections?
- **Modify holds plan:** Consider adapting a variable price-based holds ratio chart. Use this to evaluate buying extra copies to meet demands.



Example: Variable price-based holds ratio chart

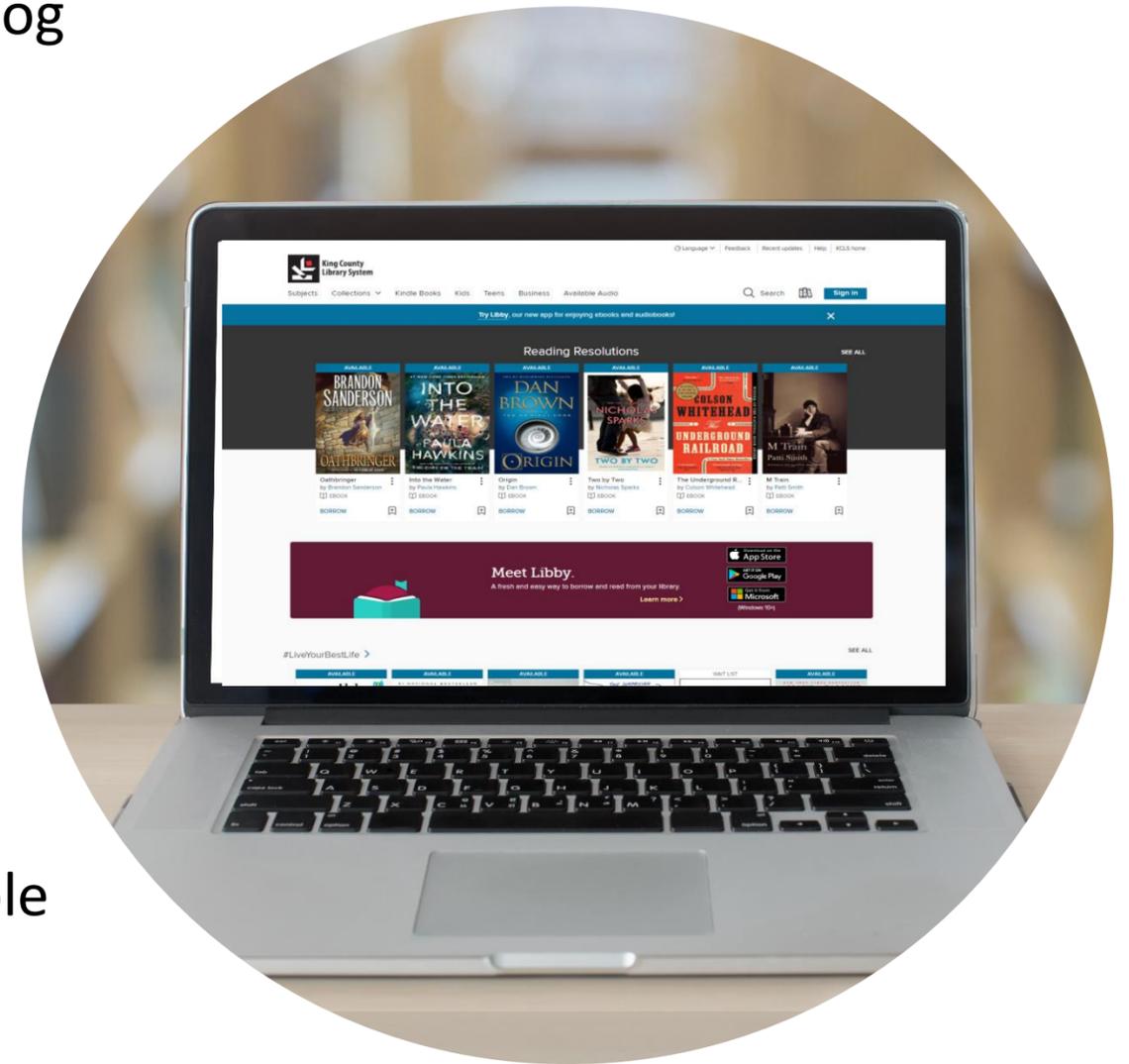
Price Range	Target Ratio
Under \$25	4:1
\$25-\$50	5:1
\$50-\$75	6:1
\$75-\$100	7:1
Over \$100	8:1

Curating for your Advantage library



Drive circulation with curated collections

- Feature mid- and back-list titles. You've built a deep catalog so show it off!
- Curate “Available Now” content.
- Set homepage curated lists to “Show all titles, but show available first”.
- Highlight Simultaneous Use plans with collections.
- Highlight one previously popular title with several available copies that aren't checked out.
- No time to curate? *Ask us for help!*



Curating collections: Turn on Advantage curation

Advantage libraries can customize the collections at their digital library by modifying the consortium's collections or curating their own.

Customize Advantage collections

YES NO

You are currently maintaining all collections in this section of your Advantage site. To automatically display your consortium's collections in this section of your site instead, change this setting to NO.

[Learn more >](#)

When you select Yes ▾

- You'll be able to edit, rearrange, or delete drafts of the consortium's collections.
- You'll be able to create new collections.
- Any curated collection from your consortium that isn't deleted or edited **will** be updated whenever they make changes.
- Any automated collection from your consortium **won't** be updated when they make changes.
- You **won't** receive new collections created by your consortium.

Getting started with curation

OverDrive Marketplace

Search for titles to curate by title, author, series, or publisher [Advanced search](#)

SHOP One Copy/One User & Metered Access | [INSIGHTS](#) | [ADMIN](#) | **[CURATE](#)** | [NEWS](#) | [INVOICING](#) | [SUPPORT](#) | [FEATURED](#)

Standard curation | [Organize published collections](#)

Standard collections

Select **Create standard collection** to create automated or curated collections of titles you own, then publish them to your OverDrive website. This is a great way to showcase your content and boost circulation.

[Learn more about curation.](#)

CREATE STANDARD COLLECTION

Published standard collections

The collections below are the standard collections that are currently live on your site.

	Name	Mapped to	Description	Curator	Titles	Type	Published on
<input type="checkbox"/>	1 Standards-Based	Sora - Home page		Bailey Hotujac	27	Curated	11/29/2017
<input type="checkbox"/>	2 ELL / ESL	Sora - Home page		Bailey Hotujac	72	Curated	11/28/2017
<input type="checkbox"/>	3 En Español	Sora - Home page		Bailey Hotujac	242	Curated	7/27/2018
<input type="checkbox"/>	4 Chinese & Bilingual Books	Sora - Home page		Bailey Hotujac	63	Curated	11/28/2017
<input type="checkbox"/>	5 Novel Sets & Classroom Reads	Sora - Home page		Bailey Hotujac	50	Curated	12/1/2017

Create curated and automated collections

3

Hand-pick titles for curated collections.

Create automated collections using filters.

Create collection

Collection type:

Curated

Hand-picked titles typically based on a theme. Ex: Holiday Favorites, *Gone Girl* Readalikes

Automated

Auto-populating list based on specific criteria. Ex: Newly Added, Most Popular Audiobooks

Collection name

Collection description

Pin as main collection

NEXT

CANCEL

Search & Curate



Advanced search & curate

Audience

Young adult x Juvenile x

These values match the audience filters on your OverDrive website, not the audience values in Marketplace.

Subject

Comic and Graphic Books x

Format

eBook x

Language

English x

Publisher

VIZ Media x

Standard curation: Pin as main collection and create draft

The screenshot displays the 'Curation' interface in the Rakuten OverDrive system. At the top, a navigation bar includes links for SHOP, INSIGHTS, ADMIN, CURATE, NEWS, INVOICING, SUPPORT, and FEATURED. The main content area is divided into several sections:

- Settings:** At the top left, there are two checkboxes: 'Pin as main collection' (checked) and 'Lock to prevent changes by others' (unchecked). A blue circle with the number '4' highlights the 'Pin as main collection' checkbox.
- Summary:** This section includes a 'Collection name' field (containing 'Test Collection') and a 'Collection description' text area. Below these is an 'Availability filter' dropdown menu set to 'Show all titles, but show available first'.
- Publishing locations:** A large empty text area on the right side of the page. A blue circle with the number '5' highlights the 'CREATE DRAFT' button located above this area.
- Details:** At the bottom, there is a table header with columns: Title, Edition, Creators, ISBN, Audience, Subjects, Publisher, Format, Own OCO..., Own MA, SU, CPC, Holds, and Available f... The table is currently empty, with a message stating 'There are no titles in this curated collection.'

Additional buttons include 'CREATE DRAFT' (grey) and 'PUBLISH' (green) at the top right, and 'CREATE WORKSHEET' (grey) and 'DELETE TITLE(S)' (red) in the bottom right corner.

Standard curation: Search your collection to add titles

Results for:
Title=**The Sun is Also a Star**

1 - 2 of 2
[Edit search](#)

Descending by

Select this page ADD TO MAIN COLLECTION

 **The Sun is Also a Star**
Nicola Yoon
Random House, Inc. | Random House Children's Books | Delacorte Press
Young Adult Fiction
Romance, Young Adult Literature
Young Adult Fiction / Romance / General
Young Adult Fiction / Social Themes / Emotions & Feelings
Young Adult Fiction / Social Themes / New Experience
Language(s): English
On-sale date: 5/10/2016
Street date: 1/1/2016
SAMPLE Text difficulty: Grade 3
Interest level: UG/Upper grades (9th-12)
ATOS book level: 4.7
[Preview full title](#)
11 Reviews

Content access level(s): Adult
ADD TO MAIN COLLECTION
[Kindle Book](#)
[OverDrive Read](#)
[Adobe EPUB](#)

● Own OC/OU: 1 | Own MA: 0 | Own SU: No | Out: 0 | Holds: 0 | Holds ratio: 0 | ● Total checkouts: 17

 **The Sun is Also a Star**
Unabridged
Nicola Yoon, Bahni Turpin, Raymond Lee, et al.
Books on Tape | Penguin Random House Audio Publishing Group | Listening Library (Audio)
Young Adult Fiction
Romance, Young Adult Literature
Young Adult Fiction / Romance / General
Young Adult Fiction / Social Themes / Emotions & Feelings
Young Adult Fiction / Social Themes / New Experience
Language(s): English
On-sale date: 5/1/2016
Street date: 1/1/2016
SAMPLE [Preview full title](#)
3 Reviews

Content access level(s): Adult
ADD TO MAIN COLLECTION
[OverDrive MP3](#)
[OverDrive Listen](#)

● Own OC/OU: 1 | Own MA: 0 | Own SU: No | Out: 0 | Holds: 0 | Holds ratio: 0 | ● Total checkouts: 9

Select this page ADD TO MAIN COLLECTION



Standard curation: Select your publishing locations, then publish

Test Collection Unlocked

Last edited by

Unpin this draft to hide it while you search & browse for titles.

7

8

9

Summary

Enter a collection name and description in each of the languages offered on your OverDrive website. If you don't enter translated collection names and descriptions, they will appear in English.

• Language
English (Default) ▼
Changes to the collection name and description will only affect the selected language.

• Collection name
Between 2 and 200 characters; visible to end users.
Test Collection

Collection description
Up to 2048 characters; this may be visible to end users.

Availability filter
Show all titles, but show available first ▼

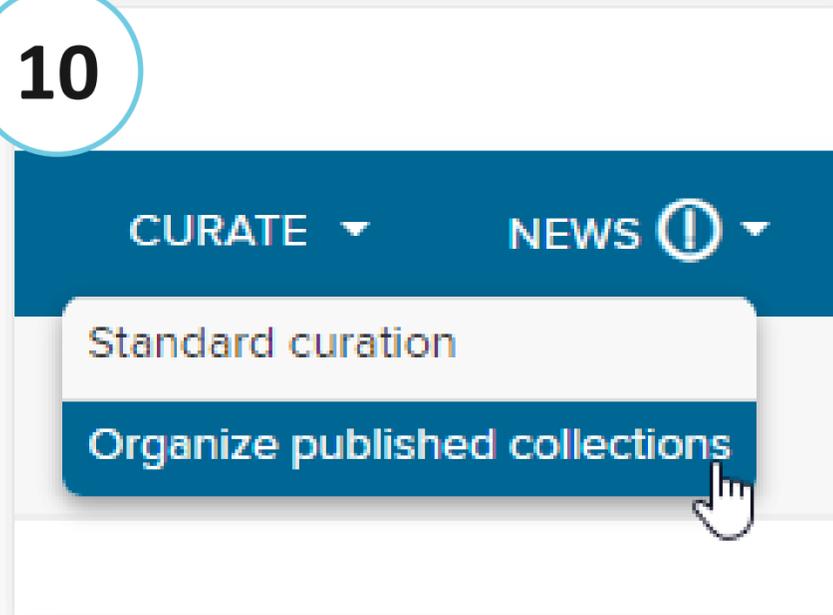
Publishing locations

Main site - Home page × Main site - EBOOKS × Main site - AUDIOBOOKS ×

SAVE DRAFT PUBLISH

Organize published collections

10



Standard curation | **Organize published collections**

Main site - Home page collections CREATE STANDARD COLLECTION

These are the collections that appear on your home page.
To feature a single title at the top of this page, include only one title in the first collection in this list (we recommend that all other collections contain between 12 and 200 titles).

- Main site**
 - Home page
 - EBOOKS
 - AUDIOBOOKS
 - VIDEOS
- Kids

A Bouquet of Books: Fabulous Floral Covers (Curated - 146) Currently published to: Main site - Home page	
Joke's on You (Curated - 497) Currently published to: Main site - Home page	
Just added (Automated - 1000) Currently published to: Main site - Home page	
Pretty in Pink: YA Edit (Curated - 77) Currently published to: Main site - Home page	
Wild, Wild West: Westerns Without the Romance (Curated - 160) Currently published to: Main site - Home page	

Automated curation

Create automated collections
using filters.

Create collection ✕

Collection type:

Curated
Hand-picked titles typically based on a theme. Ex: Holiday Favorites, *Gone Girl* Readalikes

Automated
Auto-populating list based on specific criteria. Ex: Newly Added, Most Popular Audiobooks

Collection name

Collection description

Pin as main collection

Audience

These values match the audience filters on your OverDrive website, not the audience values in Marketplace.

Subject

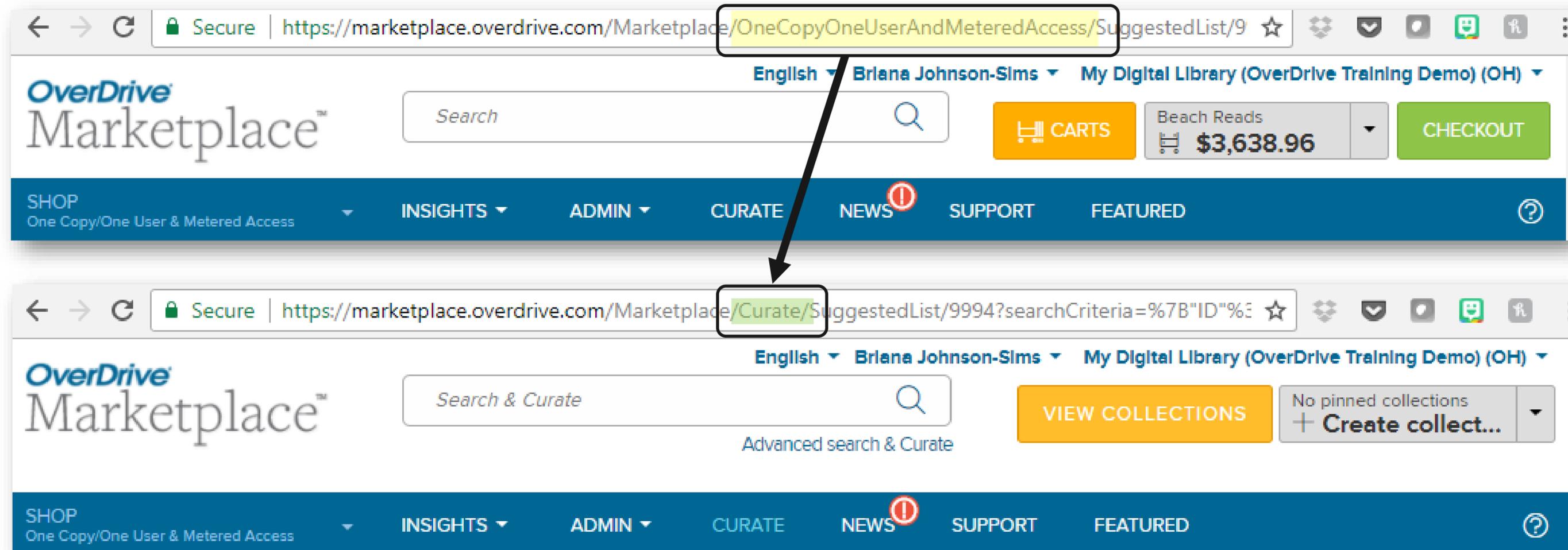
Format

Language

Publisher

Curate from Recommended Lists

1. Open a Recommended List in Marketplace.
2. Edit the URL by replacing 'OneCopyOneUserandMeteredAccess' with 'Curate':



3. Add the titles to a new or existing collection!

Gathering collection data



Reports

- Consortium and Advantage logins
 - Look for the Advantage logo.
- Reports
 - Current Holds
 - Title Status & Usage
 - Checkouts
- Title Details page



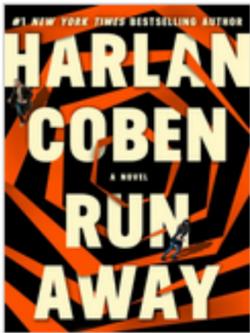
● Own OC/OU: 1 | Own MA: 0 | Own SU: No | Adv Plus shared: 0 | Own CPC: No | Out: 1 | Holds: 47 | Holds ratio: 47 | ● Total checkouts: 32

Advantage: ● Own OC/OU: 1 | Own MA: 0 | Own SU: No | Adv Plus shared: 0 | Own CPC: No | Out: 1 | Holds: 0 | Holds ratio: 0 | ● Total checkouts by Adv. users: 3

Common questions

Q: Does the Holds Ratio at the Consortium level include Advantage holds?

A: Yes. To get an accurate number of Consortium holds, subtract the number of Advantage holds from the Consortium holds.

 **Run Away**
Harlan Coben
Hachette Digital, Inc. | Grand Central Publishing
Adult Fiction
Mystery, Suspense, Thriller
Fiction / Mystery & Detective / General
Fiction / Thrillers / Suspense
Fiction / Thrillers / Domestic
Language(s): English
On-sale date: 9/19/2018
Street date: 3/19/2019

Unit(s): [ADD TO NEW CART](#) ▼

\$87.00
OC/OU \$87.00

[SAMPLE](#)
[Preview full title](#)
2 Reviews

[Kindle Book](#)
[OverDrive Read](#)
[Adobe EPUB](#)

● Own OC/OU: 3 | Own MA: 0 | Own SU: No | Adv Plus shared: 0 | Own CPC: No | Out: 3 | **Holds: 45** | Holds ratio: 15 | ● Total checkouts: 61

Advantage: Own OC/OU: 0 | Own MA: 0 | Own SU: No | Adv Plus shared: 0 | Own CPC: No | Out: 0 | **Holds: 1** | Holds ratio: 0.33 | ● Total checkouts by Adv. users: 0

Common questions

Q: Does the "Wait Time" formula take Advantage titles into account?

A: Yes. The calculation factors in Advantage units by increasing the number of copies to the specific amount the user has access to; however, it does not take into account the Advantage users' ability to skip the line depending on which copy is available. This means your Advantage user may have a shorter wait time than what is shown.

Q: Does the Current Average Wait Time include Advantage accounts?

A: Yes, we take all consortium and Advantage data into account for a consortium's Current Holds.

Common questions

Q: If I turn on Advantage curation, do the consortium lists vanish or stay on my OverDrive site?

A: Consortium collections you were utilizing will remain on your OverDrive site unless you specifically remove them; however, these collections will not be auto-updated once you have turned on Advantage curation.

Q: What happens if I only want to curate from my Advantage Collection for a short time (e.g., Summer Reading lists, special events, etc.)?

A: Once you turn off Advantage curation, the latest curated collections from the consortium will appear on your OverDrive site. *(We recommend saving drafts of existing Advantage collections before you turn off Advantage curation.)*

Common questions

Q: What is the difference between enabling RTL and creating an RTL plan?

- Enabling the RTL (Recommend to Library) feature allows library patrons to recommend titles available for sale in Marketplace that are not currently in your collection. You can see these recommendations by running a Recommendations Report.
- Creating an RTL plan (also called RTL Manager) allows you to further customize the recommendations you see from patrons. The plan will create an automated cart based on your parameters that can be generated weekly, monthly, etc.

Q: What can be determined **only** at the consortium level?

- Lending Periods
- Number of holds and loans allowed per patron
- Number of Cost-per-Circ titles allowed
- Weeding

Resource Center

OverDrive Resource Center

Library ▾ K-12 Schools ▾ Higher Education Corporate

Search for...

Welcome to OverDrive's Resource Center!

Libraries Schools

Libraries



Marketing & Outreach

We are here to help you get the word out about your OverDrive collection with free print and digital assets, communication templates, and programming & event ideas.

» Explore



Staff Training

Sign-up for live webcasts, download training templates, and view on-demand staff training recordings any time of the day or night.

» Explore



Collection Development

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Best Practices

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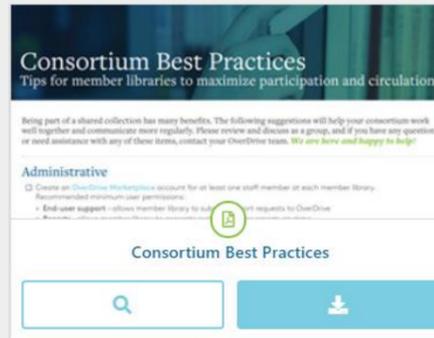


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