

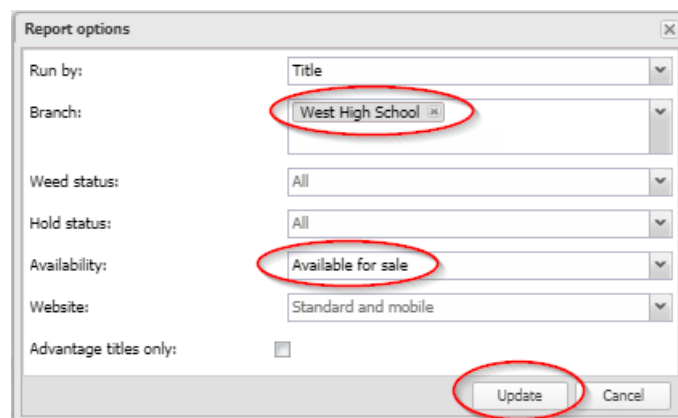
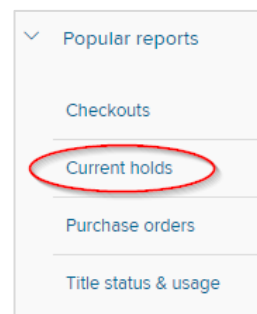
OverDrive PURCHASING FOR HOLDS (SHARED & ADVANTAGE)

Use the Current Holds report to determine titles that warrant purchasing additional copies to meet students' needs.

RUNNING THE HOLDS REPORT

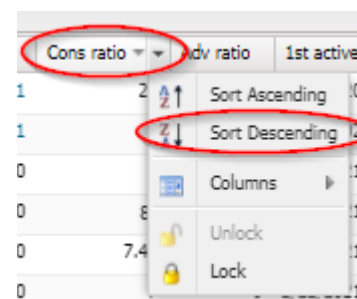
Getting started:

1. Log into Marketplace and click the **INSIGHTS** tab on the blue bar across the top of your screen.
2. Click **Current holds** (under Popular Reports on the left-hand side of the screen).
3. Click the **Run new report** button.
4. Set your report **options**:
 - *Run by*: Title
 - *Branch*: Select your individual school if you're an **Advantage school**. Otherwise, leave blank
 - *Availability*: Available for sale
5. Click Update.



Viewing search results:

1. Locate the **Cons ratio*** column and hover your mouse over the column header; an arrow will appear to the right of the header name.
 **"Cons" stands for "consortium," and refers to your district or shared collection.*
2. Click the arrow in the Cons ratio header and choose **Sort descending**. This option reorganizes results so the books with the **most holds per copy owned** are listed first.



TIP:

Ideally the ratio of **holds to copies owned** is *no more than 3*.

We will create a cart of titles with a ratio of 3 or more. Note how many titles in the report have a Cons ratio of 3 or higher.

There are 10 in the following example:

	Title	Creator	Format	All holds	Adv holds	Cons ratio	Adv ratio	1st active hold
1	My Hero Academia, Volume 2	Kohei Horikoshi	📖	1	1	37*	1	6/18/2021
2	My Hero Academia, Volume 1	Kohei Horikoshi	📖	1	1	32.33*	0.33	6/18/2021
3	Shadow and Bone: The Grisha Trilogy, Book 1	Leigh Bardugo	📖	1	1	27	1	6/17/2021
4	Bone Crier's Moon	Kathryn Purdie	📖	2	2	10*	2	5/8/2021
5	Midnight Sun	Stephanie Meyer	📖	1	1	10	0.5	6/27/2021
6	Crave: Crave Series, Book 1 (unabridged)	Tracy Wolff, He...	📖	1	1	8	1	6/15/2021
7	The Goose Girl: Bayern Series, Book 1 (unabridged)	Shannon Hale, ...	📖	1	1	5	1	5/24/2021
8	Avatar: The Last Airbender - The Lost Adventures	Various, Various	📖	1	1	4	1	6/20/2021
9	The Battle for Skandia: Ranger's Apprentice Series, Book 4 (unabri...	John Flanagan, ...	📖	1	1	4	1	7/1/2021
10	The Fellowship of the Ring: The Lord of the Rings Series, Book 1 (a...	J.R.R. Tolkien, ...	📖	2	2	4	2	6/19/2021
11	The Betrothed	Kiera Cass, Jasi...	📖	1	1	2	1	6/15/2021
12	Bone Crier's Moon: Bone Grace Series, Book 1 (unabridged)	Kathryn Purdie, ...	📖	1	1	2	1	6/15/2021
13	Crooked Kingdom: Six of Crows Series, Book 2	Leigh Bardugo	📖	1	1	2	1	7/3/2021
14	Fall of Hades: Michael Vey Series, Book 6	Richard Paul Ev...	📖	1	1	2	1	6/30/2021
15	The Nightingale: A Novel (unabridged)	Kristin Hannah, ...	📖	1	1	2	1	6/4/2021
16	A Court of Thorns and Roses: A Court of Thorns and Roses Series, ...	Sarah J. Maas	📖	1	1	1.5	0.5	7/7/2021
17	The One: The Selection Series, Book 3	Kiera Cass	📖	1	1	1.5*	0.5*	7/7/2021
18	The Burning Bridge: Ranger's Apprentice Series, Book 2 (unabridged)	John Flanagan, ...	📖	1	1	1	1	7/2/2021

Creating a cart from the Current holds report:

- From the Current holds search results, click **Convert to new cart**.
- In the pop-up window:
 - **Name** your cart.
 - Add a **description** (optional).
 - Add the **number of titles** with a Cons ratio of 3 or more.
 - Select Cons ratio for the **Include titles based on** field.
 - Ensure **Pin as main cart** is checked.
 - Click **CREATE** to generate holds cart.
- Click the orange **CARTS** button in the upper right-hand corner of Marketplace.



Create new cart from

Current holds

Fields marked by * are required.

* Name

Advantage Holds

Description

Optional

* Number of titles from report to add to cart

10

* Include titles based on

Cons ratio

☒ Pin as main cart

☐ Lock to prevent changes by others

CREATE

CANCEL

Locating and reviewing your holds cart:

1. On the **CARTS** page, locate the holds cart you created.
2. Open the **holds cart**.
There will be one copy of each title from your holds report with a Cons ratio of three or more.
3. Review the titles in the hold cart.

TIP:

Pay close attention to the **Adv active holds** column.

This is the **total number of current active holds** from users at your school.

If you see a **high number of holds** from your users, you may want to increase the number of copies you're purchasing.

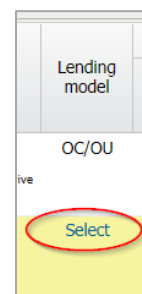
In the example below, there are **not** more than **2 Adv active holds** for any title, so we'll only purchase 1 copy of each book for now.

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	Title	Creator(s)	Language	Format	Lending model	Cons MA	Adv MA	Cons OC/OU	Adv OC/OU	Total check...	Adv checkouts	Cons active holds	Adv active holds	Ad...
1	Avatar: The Last Airbender - The Last Adventures	Various, Various	English	Kindle Book, OverDrive Read	OC/OU	0	0	1	0	29	0	4	1	1.00
2	The Battle for Skanda: Ranger's Apprentice Series, Book 4 (unabridged)	John Flanagan, John Kestling	English	Kindle Book, OverDrive Read	Select	0	0	1	0	12	0	5	1	1.00
3	The Betrothed	Kiera Cass, Jasika Nicole	English	OverDrive MP3, OverDrive Listen	OC/OU	0	0	1	0	12	1	4	1	1.00
4	Bone Crier's Moon	Kathryn Purdie	English	Kindle Book, OverDrive Read, Adobe EPUB	MA: 26 months (one user)	1	0	0	0	9	0	13	2	2.00
5	Bone Crier's Moon: Bone Grace Series, Book 1 (unabridged)	Kathryn Purdie, Fiona Hardingham, Alex Wyndham, Billie Fulford-Brown	English	OverDrive MP3, OverDrive Listen	OC/OU	0	0	1	0	3	0	2	1	1.00
6	The Burning Bridge: Ranger's Apprentice Series, Book 2 (unabridged)	John Flanagan, John Kestling	English	OverDrive MP3, OverDrive Listen	Select	0	0	1	0	88	2	1	1	1.00
7	Crave: Crave Series, Book 1 (unabridged)	Tracy Wolff, Heather Costa, Tim Paige	English	OverDrive MP3, OverDrive Listen	Select	0	0	1	0	11	1	10	1	1.00
8	Crooked Kingdom: Six of Crows Series, Book 2	Leigh Bardugo	English	Kindle Book, OverDrive Read, Adobe EPUB	MA: 12 months (one user)	1	0	0	0	26	2	2	1	1.00
9	Fall of Hades: Michael Vey Series, Book 6	Richard Paul Evans	English	Kindle Book, OverDrive Read, Adobe EPUB	Select	0	0	0	0	243	3	2	1	1.00
10	The Fellowship of the Ring: The Lord of the Rings Series, Book 1 (abridged, dramatized performance)	J.R.R. Tolkien, Ensemble cast	English	OverDrive MP3, OverDrive Listen	Select	0	0	1	0	105	4	4	2	2.00
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Selecting a lending model (where needed):

If any titles are highlighted in yellow (see above screenshot for an example), you'll need to choose a lending model for that title before purchasing.

1. Locate the **Lending model** column.
2. Click **Select** where it appears in that column for each highlighted title.



3. Select the **desired lending model** for that title in the pop-up window.
4. Click **APPLY** to confirm the chosen lending model.

Select lending model

Some titles are available in more than one lending model, choose a lending model for each title below.

OC/OU & MA: 12 months (one user)

Title	OC/OU	MA: 12 months (one user)
The Battle for Skandia	<input checked="" type="radio"/> \$63.00	<input type="radio"/> \$31.50
The Burning Bridge	<input checked="" type="radio"/> \$63.00	<input type="radio"/> \$31.50

Clear selection

OC/OU & MA: 100 checkouts (concurrent users)

Title	OC/OU	MA: 100 checkouts (concurrent users)
Crave	<input type="radio"/> \$59.95	<input checked="" type="radio"/> \$95.92
The Fellowship of the Ring	<input type="radio"/> \$33.00	<input checked="" type="radio"/> \$52.80

Clear selection

APPLY DO THIS LATER RESET

Purchasing your cart:

1. Click the green **PURCHASE CART** button (or click **CREATE QUOTE** to generate a quote if needed to secure a Purchase Order).



2. Complete your purchase by agreeing to the **special conditions** and selecting your **payment method**.

PURCHASING HOLDS ADDITIONAL TRAINING (*OPTIONAL*)

Looking for more in-depth training on getting your holds current or managing holds in Marketplace?

- [Get Holds Current in OverDrive Marketplace](#) (video)
- [Managing Holds in Marketplace](#) (video)
- [What is the holds ratio and where can I find it?](#) (Marketplace Help article)
- [How to purchase a cart](#) (Marketplace Help article)
- [How to create a quote](#) (Marketplace Help article)