

## Overdrive Overview - Ordering

### **Before you begin:**

- You will need to be assigned a user name and password.
- You will need to designate one person at your library to receive billing email.
- Sign up for Content Wire so you can receive monthly collection development suggestions by email: <http://partners.overdrive.com/overdrive-newsletter-signup/>

### **Placing an order:**

1. Link to Content Reserve: <https://marketplace.overdrive.com/Account/Login>
2. Bookmark Site or Add to favorites
3. Log in:  
**User Name:** Library and name (example: fingerlakes.lib.aschiavulli)  
**Password:** Generated by Overdrive. If you cannot access your account, click "forgot password"
4. Review Patron Recommended Titles (optional)
  1. Click on the Reports Tab
  2. Click on the Recommendations, Click on Run new Report
  3. On the Pop-up change the selections to your library and the dates requested (end date should be current date) and click on OK.
  4. The results will be the patron recommendations by your Library and date range.
  5. Click on the title of the item and a new window will open.
5. Select:
  1. Add to Cart or Add to New Cart and create your cart.
    - Name your list/cart with the following naming convention: **Name -Type of Material-Date**;
      - i. For example, an FLLS cart would be: FLLS-Adult-11-10-14.
      - ii. If you want to create another list in the same day you can add the number of the list to the material type: FLLS-Adult2-1-10-14.
    - Lists can be merged before you purchase.

**NOTE: If you are adding to a cart that was previously created, skip to step #14.**

6. For the most flexibility go directly to Marketplace by selecting the Marketplace Tab to browse titles, use selected Title Lists, and Content Wire tips, or choose Advanced Search which allows you to limit search by format.  
**Always Check to be sure you are ordering the intended format.**

7. You will see that your results display available titles and a bar in the left hand column indicates whether it's an item we own, an item we've selected, how many are checked out, and if there are any holds on it.

**Example - Own:2 Out:0 Holds:0**

- You may see “**Pending**” as a field. That means the item is in a cart. This does NOT mean someone is ordering the item. The item could be in a Smart List and never be ordered. (See Step 14 for more information)
8. Select quantity and Add to cart. There are 3 ways to do this: 1) as a list, 2) selected items for page only, 3) one item at a time.
  9. When you are ready to place your order, view your cart.
  10. You can sort your lists by clicking any of the headings. **Take the time to sort by format and review the format you intended. Even if FLLS does not support a particular format; if you buy it there are no returns.**
  11. Select Complete P.O. (purchase order).
    - Please name your P.O. using your library code and then the P.O. Number (i.e.: FLLS 14850) or if you do not have numbered P.O.s, use the name of the cart you are ordering as the P.O. (ITH-Adult-121514). This will make it easy to cross reference purchases.
  12. You will have to agree to the terms of purchase by checking ALL checkboxes agreeing to the terms.
  13. Titles will be available in 90 minutes – **NO RETURNS.**
  14. To return to a cart you have been working on select  and find your cart in the list. The lists are in ABC order. If there are stray lists with your name on them, this is a good time to delete them.

**More notes on Carts:**

- Any carts that are left unlocked for more 2 months will be deleted.
- **Smart Lists** are automatically generated and are for all members to use. They will appear as Rex being the creator with cart titles such as: *Top 100 eBook Adult, Top Gaps in Collection*, etc. Feel free to move titles from these lists to your own carts to purchase them. Amanda deletes old carts every month.
- Amanda also compiles carts of patron requests and orders them periodically with FLLS funds. If you have an open order that you have not placed, be sure to double check it before you place your order to ensure the item(s) in your cart still have a need.

- Examples of this:
  - Your patron requested you purchase Book Title.
    - There are 2 copies in the system and 50 holds.
    - Beneficial to purchase Item.
  - Your patron requested you purchase Book Title 2.
    - There are no copies in the system.
    - Beneficial to purchase Item.
  - Your patron requested you purchase Book Title 3.
    - You put Book Title 3 in cart and wait until the end of the month.
    - You go to purchase cart and notice the system has one copy, checked in and no holds.
    - Not beneficial to purchase item (and your patron probably already got it)
- Please note that we can all see ALL orders. Take care not to delete or alter other lists. Titles that are placed in carts should be ordered promptly, since they will appear as pending to any other selector. To ensure a cart you are working on will not be edited by another member, **LOCK IT**.

15. Check the name of the cart. If you forgot to name it according to our conventions, select the list and edit name.

**NOTE: a new cart is automatically created every time you log in so you will need to delete stray lists as well as lists you no longer need.**

16. Select Reports for interesting information about your collection by library. Some useful reports are Purchase Order History, Circulation History and Current Waiting List. Fill in appropriate dialogue boxes for queries and select your library to help you decide what to order.

## Support

### **For training support**

From this link you can view the Best Practices and training documents.

<http://partners.overdrive.com/learning-center/>

**If you are in the middle of ordering and you have a question, please call:**

(607) 273-4704

Amanda Schiavulli, ext. 227 or Rex Helwig, ext. 240

### **For Invoicing Support**

Use the Invoicing Support button under the Support Tab to communicate with Overdrive billing for any problems.

## **Overdrive: Consortium eContent Collection Development Policy**

The Finger Lakes Library System's eContent collection is guided by the eContent Selection Policy. FLLS endorses and adheres to the "[Freedom to Read](#)" statement, the "[Freedom to View](#)" statement, and the [Library Bill of Rights](#), all of which were adopted by the American Library Association.

All member libraries are encouraged to contribute matching funds in proportion to their patron's usage of our Overdrive collection. Selection of materials is the responsibility of each member library that adheres to their print Collection Development policy. If member libraries contribute to the Overdrive Purchase Pool, selection is at the discretion of the Education and Outreach Librarian at the Finger Lakes Library System. Selection of electronic content is based on interest, entertainment, informational needs and individual requests of all library card holders in the Finger Lakes Library System's service area.

**Note:** TCPL selectors will make every effort to order the amount of adult non-fiction indicated in the Central Book Aid (CBA) budget.

All or some of the following criteria may be considered when adding new items to the collection:

- Accuracy, timeliness, format compatible with all readers and players
- Price and availability
- Public appeal or local interest
- Relevance to the present and potential needs to the community

Suggestions are welcome and should be done through Overdrive's [Additional Titles to Recommend](#) option.

No individual may censor or restrict the freedom of others to read or listen to the collection. Responsibility for monitoring a child's access to resources rests with the parent or legal guardian. Should a patron express concern about the suitability or classification of a particular title, they should be directed to fill out the [Reconsideration of Materials Form](#).

Titles are selected to be withdrawn from the collection in order to maintain its usefulness, currency and relevance by the Education and Outreach Librarian at the Finger Lakes Library System in accordance with the C.R.E.W Weeding manual for eBooks on a yearly schedule.

## Purchase Models

At this time, no maximum access plans and no movies have been purchased. If you wish to add these collections, **FLLS must be notified ahead of time or they will not appear on the website.** The website must be redesigned to accommodate other formats and the time will vary.

### **ebooks**

One Copy/ One User: In collection until/unless weeded.

Metered per Checkout: In collection until a certain amount of checkouts and then repurchased or expired.

Metered per Timeframe: In collection for a given period of time and then repurchased or expired.

### **Audiobooks**

One Copy/ One User: In collection until/unless weeded.

**Metered Checkout emails:** When metered eBooks are about to run out of circs/time, EVERYONE will get an email with how many circs/time is left on each item. This is to help with your collection development. Items that expire

## Formats

### **ebooks**

Kindle: Kindle devices or any device with Kindle app

EPUB: Authorized use with Adobe Digital Editions on compatible devices with OverDrive app or desktop software

PDF:

OverDrive Read: Read in compatible device or desktop browsers

### **Audiobooks**

MP3: OverDrive app or desktop software

WMA: Windows desktop and transferred to Apple device via iTunes (2014: not recommended; OverDrive is working to phase it out and is not compatible with latest edition of iTunes)

## Finding Quality Content

- Tuesday is “new title day” on Overdrive.
- Use Smart Lists, Must-Haves, etc.
- Don’t just look at award winners, but order the finalists too.
- Check summer reading lists.

- Check best seller lists: not just NYTimes, but NPR, People Mag, USA Today, WSJ.
- Check Amazon movers and shakers.
- Check Early Word Galley Chat: Self-published best seller list.
- Check Publisher's Weekly's Library Section.
- Check IndieNext List.
- Look at Shelf-Awareness.com. "Media Heat" has books that are currently on TV shows, etc.
- Check NoveList
- Be put on the routing list for the monthly Overdrive newsletter or other collection development journals routed through FLLS. (*Hornbook*, *School Library Journal*, *VOYA*, etc.) Let Amanda know if you would like your library on any of these lists.
- Check the Collection Development resources on our website:  
<http://www.flls.org/collection-development/>

### Tips and Preferred Practices

- Do not use subject search because the volume of results will slow process.
- Avoid quick search since Advanced Search offers greater flexibility.
- Avoid Tuesdays as this is the day they are running uploads of new content from the publishers. Alternately, this could be a great day for building a cart and not placing the order.
- Early in the day is better than later in the day since half the country isn't on during the morning hours.
- Narrative non-fiction circulate better than how-to manuals.
- Titles that are placed in carts should be ordered promptly, since they will appear as pending to any other selector.
- When one part of a series is requested or is popular, buy the rest. (Click on the series title). Search for (for example) "book 4" of a series and see if we have all of them.
- Give them what they want: check the "recommend to library" authors. If a patron wants one book by the author, buy others.
- Have routines to search your favorite categories by last so many days or weeks (to keep up and not duplicate work).
- Purchase multiple copies of popular materials by looking at the hold ratio.
- Order regularly throughout the year and incorporate digital ordering into the print ordering process.
- Hold Ratio Purchasing Guidelines:
  - Less than \$25           4:1
  - \$25-50                 6:1
  - \$50-75                 8:1
  - \$75-100               10:1
  - \$100-125              14:1
  - \$125-150             18:1
  - Over \$150             22:1

## Subject Analysis from December 2013 - December 2014

We have found that what circulates in print does not necessarily circulate well in digital format.

| <b>Subjects that do well</b><br><i>Leisure reading; narrative non-fiction</i> | <b>Subjects that don't do well:</b><br><i>Non-narrative books</i> |
|---|---|
| Fiction   | Travel  |
| Romance   | Foreign Language  |
| Literature (Classics)   | Inspirational   |
| Mystery   | Math  |
| Nonfiction  | Careers   |
| Young Adult   | Home Design   |
| Fantasy   | Medical   |
| Thriller  | Travel  |
| Historical Fiction  | Urban Fiction   |
| Suspense  | Text Book   |
| Science Fiction   | Management  |
| Juvenile Fiction  | Recovery  |
| Biography   | Christian Fiction   |
| History   | Crime   |

**The following are types of book that do not circ well, regardless of subject headings:**

- “For Dummies” books
- Dead celebrities
- NOLO Guides
- Computer Books
- Books in PDF format
- Flash Cards
- Cliff Notes

### **Advanced Search Screen Tips**

- If you choose the Advanced Search Screen from your initial list, you will have the option of limiting by abridged or unabridged. From this screen author = creator.
- If you choose the Advanced Search Screen from Marketplace you do not have the option of limiting by abridged/unabridged, and author and creator are separate search boxes.
- In both cases remember to limit by format to minimize mistakes. Subject Search is not a good choice from any screen. The lists are fine and can be accessed directly from Marketplace as well.
- Choose lists from this form rather than Marketplace tabs unless you are simply browsing.

### **Challenges by patrons to eContent**

All eContent is owned by the Finger Lakes Library System. If a patron expresses concern about the suitability or classification of a particular title, they should fill out the FLLS Reconsideration of eContent Form and submit it to the Executive Director at the Finger Lakes Library System. The matter will be presented to FLLS board of trustees for review. The patron will have an opportunity to attend the board meeting where an open discussion of the challenged material(s) will occur.

Reconsideration of eContent forms will be kept on file for one year after a final decision has been made.

The request will be considered in light of FLLS' eContent selection policy, the principles of the ALA Library Bill of Rights, the opinions of the various reviewing sources, and any other appropriate sources.

## Reconsideration of eContent Form

Please fill out this form to facilitate the re-examination of the classification and suitability of a title in the Finger Lakes Library System's eContent collection

Title:

Author:

Format (check all that apply)

- eBook
- eAudiobook

Your full name:

Library card number:

Email address:

Home address:

City/State/Zip code:

Phone:

What did you find unsuitable in this work? (please site specific pages or parts)

Did you read or listen to the entire work?

What action would you recommend be taken regarding the use of this material?

(Please use back if more room is needed)

Signature \_\_\_\_\_ Date \_\_\_\_\_

Please send form to:  
Finger Lakes Library System  
Executive Director  
1300 Dryden Road  
Ithaca, NY 14850