OverDrive Marketplace User Guide

OverDrive Marketplace is OverDrive’s shopping portal, where you can shop for eBooks, audiobooks, music, and video titles for your library or school.

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Shop

The Shop tab in OverDrive Marketplace is where you’ll find titles to buy for your library or school. There are three different lending models to shop from:

**One Copy/One User**

One Copy/One User titles can be checked out by one person at a time, and they never expire from your library collection.

**Metered Access**

Metered Access titles can be checked out by one person at a time, and they expire from your library collection after a determined period. Some Metered Access titles are metered by time (e.g., they expire after 12 months), some are metered by licenses (e.g., they expire after 26 checkouts), and some are metered by both (e.g., they expire after the earlier of two years or 52 checkouts). You will receive an email alert when a Metered Access title is about to expire, so you can repurchase it if you’d like.

**Simultaneous Use**

Simultaneous Use titles can be checked out by unlimited people simultaneously, and they expire from your library collection after a determined period (for example, after one year).

Simultaneous Use titles are purchased as “plans” from specific publishers. For example, Publisher A’s Simultaneous Use plan might allow you to select any 25 titles from Publisher A for a flat fee, and circulate those titles to an unlimited number of simultaneous users for one year. Please note that you cannot mix and match titles from different publishers in any Simultaneous Use plan.

**Where can I shop for each lending model?**

Choose a lending model from the Shop drop-down menu.

Please note that the One Copy/One User and Metered Access catalogs may or may not be merged in your Marketplace. This setting is controlled by your Marketplace administrator.

*Note: If you are an OverDrive Marketplace administrator, see the Preferences section of this guide for instructions on how to change this setting.*
How to purchase content credit

You can purchase credit for a Marketplace account on the Purchase Content Credit page, located under the Shop tab. Any subsequent Marketplace purchases on that account (such as content or MARC record orders) will then be applied against your content credit.

To track how much content credit you have purchased, use the Content credit order history report located under the Reports tab. Please note that this report only shows how much content credit has been purchased (not how much has been used).

Note: US accounts will also see their estimated content credit displayed in the upper-right corner of Marketplace. Please note that this is only an estimate of your current content credit, and might not reflect recent purchases and/or deposits.
What are the standardized reading levels and scores that I see for some titles?

Many juvenile and young adult titles in OverDrive Marketplace have been assigned standardized reading levels and scores, which may include:

- Reading level
- Interest level
- ATOS™ book level
- Lexile® Measure

These levels and scores can help libraries find titles that meet specific reader needs, and can also help readers decide which titles are right for them. You can read more about what these levels and scores mean and where they come from at help.overdrive.com.
How do I know which Marketplace titles I already own?

There are several places in Marketplace where you can see if a title is already in your digital collection, as well as whether it’s been added to other Marketplace carts for your library:

- On a search results page
- On a title details page
- On a cart details page

If a title has already been added to other Marketplace carts for your library, you’ll see the number of Pending copies for that title. You can click the Pending link to see which carts already contain that title.

For One Copy/One User titles, titles metered for a certain amount of time (e.g. 12 months), and Simultaneous Use titles, the Own number shows how many copies of the title are already in your collection. If you belong to a consortium, you may see two sets of numbers: one row showing the figures for the shared collection, and one row showing the figures for Advantage collections. Advantage libraries should log into their Marketplace Advantage accounts to see the figures for just their Advantage collection.

For titles metered for a certain number of checkouts (e.g. 26 or 52 checkouts), instead of Own figures, you’ll see how many Licenses of a title your library has purchased, as well as how many of those licenses have been Used, and how many are Remaining.
You can open any of your carts to see which titles in that cart have also been added to other carts (Pending column) and which titles your library has already purchased (Own, Licensed, and Remaining columns).

Please note that titles metered by checkouts do not show up in the Own column in the cart details view. To see if your library already has already purchased these titles, make sure to look at the Licensed and Remaining columns.

<table>
<thead>
<tr>
<th>Own</th>
<th>Pending</th>
<th>Holds</th>
<th>Licensed</th>
<th>Remaining</th>
<th>Own Sim, Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>91/41</td>
<td>15</td>
<td>355/228</td>
<td>52/0</td>
<td>52/0</td>
<td></td>
</tr>
<tr>
<td>0/0</td>
<td>2</td>
<td>0/0</td>
<td>52/0</td>
<td>52/0</td>
<td>N</td>
</tr>
<tr>
<td>88/41</td>
<td>1</td>
<td>355/228</td>
<td>0/0</td>
<td>0/0</td>
<td>N</td>
</tr>
</tbody>
</table>

**Cart details view:**

- Titles metered by checkouts show up in the Licensed and Remaining columns.
- All other titles show up in the Own column.
Search: One Copy/One User and Metered Access

There are several ways to search for titles in the One Copy/One User and Metered Access catalog(s).

Quick keyword search

Run a quick keyword search using the search bar. You can search for multiple terms at once (for example, entering “twilight meyer” into the quick search bar will yield results that contain both of those terms).

Basic search

Use the basic search (located in the left sidebar) to search by title, author, format, audience (adult, young adult, or juvenile fiction or nonfiction), subject, publisher, on-sale date, and more.

Advanced search

Use the advanced search (also located in the left sidebar) to search by any of the basic search criteria plus series, edition, language, awards, reading level, ATOS book level, Lexile Measure, price, and more.

How to edit a search

After you run a basic or advanced search, you’ll see an Edit search link above your search results. Click this link to edit your search criteria and then save or re-run your search.
Simplify searching with curated and customized lists

To save you time and help you hone in on the content you’re looking for, Marketplace provides lists of titles that have been chosen by OverDrive’s collection development specialists, as well as lists that help fill gaps in your library’s existing collection.

Must have

The left sidebar is stocked with our collection team’s latest lists of must-have titles, including current bestsellers, reviewed titles, featured publishers, and themed lists.

- Must have
- All saved searches

OverDrive’s Top Authors

Select the OverDrive’s Top Authors search to view titles by OverDrive’s most popular authors that your library doesn’t own yet.

- OverDrive’s Top Authors
  See what you’re missing

Top 200 series search

Select Top 200 series search from the left sidebar to see the top 200 titles you don’t own that fill gaps in adult, YA, or juvenile series in your collection.

- Top 200 Adult series
- Top 200 YA series
- Top 200 Juvenile series
## Top 200 adult, YA, and juvenile titles

In the left sidebar, you’ll also see options to view the top 200 adult, YA, or juvenile titles that are not currently in your collection. If you select one of these options, you’ll be able to narrow your search down further to the top 200 fiction eBooks, fiction audiobooks, nonfiction eBooks, and nonfiction audiobooks for your chosen audience.

<table>
<thead>
<tr>
<th>Top 200 Adult titles</th>
<th>Not in your collection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top 200 Fiction eBooks</td>
<td></td>
</tr>
<tr>
<td>Top 200 Fiction audiobooks</td>
<td></td>
</tr>
<tr>
<td>Top 200 Nonfiction eBooks</td>
<td></td>
</tr>
<tr>
<td>Top 200 Nonfiction audiobooks</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Top 200 YA titles</th>
<th>Not in your collection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top 200 Juvenile titles</td>
<td></td>
</tr>
<tr>
<td>Not in your collection</td>
<td></td>
</tr>
</tbody>
</table>
Filter search results

After running any kind of search, you can narrow down your results using the filters on the left. Filters can include format, subject, publisher, language, ATOS book level, Lexile Measure, and more.
Save and pin searches

You can save basic or advanced searches that you’d like to run more than once. To save a search, fill in your search criteria in the basic or advanced search form, then select Save instead of Search.

![Save search interface](image)

In the pop-up window that opens, name your search. Here you can also give your search a description, and you can choose to “pin” your search to your Shop sidebar for maximum ease of access.

Each time you run a saved or pinned search, it will refresh with the latest results that fit your search criteria.

Where are my saved searches?

All of your saved and pinned searches are stored under All saved searches (located in the left sidebar under the Shop tab).
Where are my pinned searches?

Pinned searches are located under All saved searches, and are also stored directly in the left sidebar for one-click access.

How do I edit or delete my saved and pinned searches?

You can edit or delete your saved and pinned searches by expanding All saved searches in the left sidebar.

Click the X icon to delete a search.

Click the pencil icon to edit and re-save a search.

Where did my search options go?

When you run a search, the normal left sidebar options will be hidden on the results page. You can access these options by selecting Show other searches from the top left of the results page.
Sample searches

Sample search 1: All eBooks by a certain author, in a certain language

Imagine that you’d like to search for all English-language eBooks by Debbie Macomber. We would recommend starting with the advanced search.

1. Select eBook as your format.

2. Enter “Debbie Macomber” in the Create/Author/Narrator/Contributor field.

3. Select English from the Language drop-down menu.

4. Click Search (or Save if you’d like to save this search).

Note: Remember to run this search in both the One Copy/One User and the Metered Access catalogs if these catalogs are not merged for your library.

5. When your search results appear, you can use the filters on the left to narrow down your search further and find exactly what you’re looking for.

You can also use the Ascending/Descending drop-down menu to sort your search results.
Sample search 2: Popular science titles for middle school readers

Imagine that you’d like to search for popular science titles that would be appropriate for middle school readers. Here you can start with the basic search.

1. Enter both Juvenile Nonfiction and Young Adult Nonfiction in the Audience field.

(If you were looking for titles for elementary school readers, you might try just Juvenile Nonfiction, and if you were looking for titles for high school readers, you might try just Young Adult Nonfiction. For middle school readers, both juvenile and young adult titles might be appropriate).

2. Enter Science in the Subjects field.

3. Click Search (or Save if you’d like to save this search).

Note: Remember to run this search in both the One Copy/One User and the Metered Access catalogs if these catalogs are not merged for your library. This ensures that you find all titles that fit your criteria.

4. When your search results appear, use the Descending drop-down menu to sort your results by Popularity by sales (you can also try sorting by Popularity across libraries, although that may exclude newer content from your top results).

You can also use the filters on the left to narrow down your search results further and find exactly what you’re looking for.
Search: Simultaneous Use

To search Simultaneous Use titles, you must first select a publisher plan. Select Simultaneous Use from the Shop tab to get started.

Please note that you cannot combine titles from different publishers in any Simultaneous Use plan. Please also note that publishers offering Simultaneous Use plans may not offer all of their titles under their plans.

Quick keyword search

Once you’ve selected a publisher plan, you can enter keyword(s) in the “Search within results” bar (located in the top left corner of each publisher’s results page) to locate specific titles from that publisher.

Advanced search

Use the advanced search (located in the top left corner of each publisher’s results page) to run a search by title, author, series, edition, audience, subject, language, awards, reading level, ATOS book level, Lexile Measure, price, and more.

Filter search results

After a quick or advanced search, you can narrow down your results using the filters on the left. Filters can include format, subject, language, reading level, ATOS book level, Lexile Measure, and more.
Carts

You can create multiple carts to organize titles while you shop. For example, a school library might create multiple carts to select titles for different reading levels, or a public library might create multiple carts to select titles for various holidays or seasons.

Where are my carts?

You can create, delete, edit, and purchase carts from the View Carts page.

Each lending model has its own View Carts page. If your One Copy/One User and Metered Access catalogs are merged, you will see one View Carts page for both lending models.

To open a View Carts page, select View Carts in the upper right corner of OverDrive Marketplace.

To switch to the View Carts page for a different lending model, select that lending model from the Shop drop-down menu.

Create carts

To create a cart, click the Create cart button that appears on the right side of your search results after you run a search, open a featured list, or select a Simultaneous Use publisher.

You can also create a cart by clicking the Create cart button on the View Carts page.

You can also select Create cart from the cart drop-down menu.
Pin carts

You can create as many carts as you like, but you can only actively shop in five carts at a time (per lending model). These “active” carts are your pinned carts. To pin a cart, select Pin as main cart when you create the cart.

Or, you can pin a cart from the View Carts page by clicking the thumbtack icon.

Unpin a cart by clicking the thumbtack icon again.
Lock carts

If you lock a cart, other Marketplace shoppers from your library or school can see its contents, but they can't edit the cart. To lock a cart, select Lock to prevent changes by others when you create the cart.

Or, you can lock a cart from the View Carts page by clicking the lock icon.

Carts that you lock will be marked “Private” when viewed from your account.

Unlock a cart by clicking the lock icon again.
Edit carts

Click on a cart to open its “Cart details” page, where you can edit the cart’s contents.

To edit a cart’s settings, click the pencil icon.

This will allow you to change the cart’s name, description, pin status, and lock status, all in one place.
Delete carts

You can delete carts on the **View Carts** page. First, select the cart(s) you’d like to delete.

Then click the **Delete cart(s)** button and follow the prompts to delete your cart(s).

Copy/merge carts

You can copy and merge carts on the One Copy/One User and Metered Access **View Carts** page(s). First, select the cart you’d like to copy or the carts you’d like to merge.

Then click the **Copy/merge cart(s)** button and follow the prompts to copy or merge your cart(s).

Please note that you cannot copy or merge Simultaneous Use carts.
Move titles from one cart to another

There are two ways to move titles between carts in OverDrive Marketplace: one by one, or as a group.

Move titles one by one

To move titles from one cart to another one-by-one, follow these steps:

1. Open the cart containing the title(s) you’d like to move.
2. Click on a title that you want to move to a different cart.

That title’s details page will open in a new tab.

3. From the title details page, add the title to the pinned cart of your choice (or create a new cart) using the Add to main cart drop-down menu.

4. Once the title has been added to the cart of your choice, you can go back and delete the title from original cart, if desired (and if that cart has not been locked by another user).

Move a group of titles

To move a group of titles from one cart to another, follow these steps:

1. Make a copy of the cart containing the titles you’d like to move using the Copy/merge cart(s) button.
2. In your copied cart, delete any titles you do not want to move into a different cart.
3. Once your copied cart has been edited to contain only the titles you’d like to move, use the Copy/merge cart(s) button to merge it with the cart of your choice.

Once the copied cart has been merged with the cart of your choice, you can go back and delete the group of titles from the original cart, if desired (and if that cart has not been locked by another user).
Purchase carts

Click on a cart to open the cart (or click the green Checkout button to open your main cart), then select the Purchase cart button.

**Note:** If you do not have purchasing permission, this button will be grayed out.

When you click Purchase cart, the “Purchase confirmation” page will open, where you must read and confirm the purchase conditions before completing purchase.

You can also enter a purchase order number in the optional “Internal purchase order ID” field. This number will print on your invoice, for your records only.

To complete your purchase, click the Complete purchase button on the “Purchase confirmation” page.
Local Content

If you have “Local content” permission, you’ll have access to the Local Content tab, where you can digitally publish your own eBooks, audiobooks, music, and video titles for users to borrow from your public-facing site.

When you publish a title through Local Content, that title will appear in your library’s digital collection under the One Copy/One User lending model, at no additional charge. You can set the number of copies of Local Content titles you want to make available in your collection using Preferences link in Marketplace (this requires “Preferences” permission). Please note that these titles will not be available to any libraries outside of your own.

In order to publish a title through Local Content, your organization must own the copyright for that title.

Overview: How to add a Local Content title

Before you begin, please note that your library must hold the necessary ownership rights, licenses, and/or permissions to upload titles through Local Content. If you have questions or doubts about rights to any title, the title should not be submitted through Local Content. When you add a title to Local Content, you will be asked to confirm that all such rights are in place. Please see the Local Content terms and conditions section of this guide for more information.

Next, follow these steps to add a Local Content title to your digital collection. Please note that you can only add or edit one title at a time.

1. Select Add a title under the Local Content tab.

2. Select Audiobook, eBook, Music, or Video to continue.
3. Select the format(s) for your title, which will appear as the title’s “available formats” on your public-facing site. The supported formats are:

- For audiobooks: MP3 only
  \textit{Note: For audiobook submission instructions, please see the \textit{How to upload audiobook files} section of this guide.}

- For eBooks: Adobe EPUB, Open EPUB, Adobe PDF, Open PDF
  \textit{Note: EPUB titles that you submit through Local Content will also be made available to your library users in OverDrive Read format. For eBook submission instructions, please see the \textit{How to upload eBook files} section of this guide.}

- For music: WMA only
  \textit{Note: Music titles will be made available to your library users in WMA format, but you must submit them through Local Content in MP3 format. For music submission instructions, please see the \textit{How to upload music files} section of this guide.}

- For video: WMV only
  \textit{Note: Video titles will be made available to your library users in WMV format, but you must submit them through Local Content in MP4 format. For video submission instructions, please see the \textit{How to upload video files} section of this guide.}

4. Select \textit{Continue}.

5. Continue reading this guide for help uploading your files and completing the local content form. You can save your work at any time by selecting the \textit{Save work in my queue} button.

   Then, you can return to the form later by selecting \textit{Continue work} under the \textit{Local Content} tab.
6. When you’re ready to submit the Local Content form, click the **Set live once all files are processed** button. Your title will be published to your public-facing site as soon as OverDrive has processed all associated files.

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**How to upload audiobook files**

The files for an audiobook must be submitted to OverDrive via FTP, separate from the Local Content form for the audiobook title. Please contact your OverDrive Account Specialist (whose contact information is listed under the **Support** tab) for your specific FTP instructions.

Audiobooks titles must be submitted to your OverDrive FTP site as a group of numbered MP3 tracks, no longer than 79 minutes each, saved in a .zip file with an easily identifiable name.

Please follow these guidelines when submitting an audiobook:

- The MP3 should be encoded at 128kbps or above.
- The MP3 audiobook should be submitted as a .zip file that is clearly named. We recommend including the title of the work in the .zip file name.
- Your audio source should be separated into multiple tracks with track breaks occurring at logical breaks in the audio (such as chapters), as if it were to be commercially distributed on CD. Individual tracks cannot exceed 79 minutes in length.
- Tracks must be labeled so that they sort in order natively on the Windows OS. Using numbers (e.g. 01, 02 ... 10, 11, etc.) at the beginning of each track works great to ensure the tracks sort in the correct play order for the encoding process.
How to upload eBook files

eBook files can be uploaded directly to the Local Content form. Once you select one or more eBook format(s) and click Continue, you can use the Browse button to upload each format. The maximum file size is 100 MB.

When you submit an EPUB eBook through Local Content, we will also make that title available to your users in OverDrive Read format. For more information about getting started with the EPUB format (and OverDrive Read), please see the Local Content: Introduction to EPUBs section of this guide.

How to upload music files

The files for a music title must be submitted to OverDrive via FTP, separate from the Local Content form for the music title. Please contact your OverDrive Account Specialist (whose contact information is listed under the Support tab) for your specific FTP instructions.

Music titles must be submitted to your OverDrive FTP site as one or more MP3 files, no longer than 79 minutes each. OverDrive will then transcode the MP3 you submit to the WMA format, which is the format that will be available to your library users on your public-facing site.

Please follow these guidelines when submitting a music title:

- The MP3 should be encoded at 128kbps or above.
- The MP3 file should be clearly named so that we can easily identify it. We recommend including the title of the work in the .zip file name.
- If your title is longer than 79 minutes and requires multiple files, please label these files so that they sort in order natively in the Windows OS (e.g., by using numbers at the beginning of each file) and save them together in a clearly named .zip file.
How to upload video files

The files for a video title must be submitted to OverDrive via FTP, separate from the Local Content form for the video title. Please contact your OverDrive Account Specialist (whose contact information is listed under the Support tab) for your specific FTP instructions.

Video titles must be submitted to your OverDrive FTP site as a clearly named MP4 file. OverDrive will then transcode the MP4 you submit to the WMV format, which is the format that will be available to your library users on your public-facing site.

Please follow these specifications when submitting a video title:

<table>
<thead>
<tr>
<th>Item</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Video Codec</td>
<td>H.264</td>
</tr>
<tr>
<td>Audio Codec</td>
<td>AAC</td>
</tr>
<tr>
<td>Container Format</td>
<td>MP4</td>
</tr>
<tr>
<td>Frame Rate</td>
<td>The same rate at which you shot the video. We recommend shooting or encoding at 24 (23.98), 25, or 30 (29.97) fps. If the frame rate is greater than 30 fps, reduce it to 30 fps or lower.</td>
</tr>
<tr>
<td>Bit Rate</td>
<td>Double the highest bit rate that you intend to display to viewers (e.g., use a 4,000 kbps (kilobits per second) source video if your highest bit rate is 2,000 kbps). If your highest resolution is 1080p, we recommend 15,000 kbps. If your highest resolution is 720p, we recommend 7,500 kbps.</td>
</tr>
<tr>
<td>Interlacing</td>
<td>If your video is interlaced, deinterlace it before uploading to avoid jagged lines during playback. If the video was recorded as progressive, upload it as is.</td>
</tr>
<tr>
<td>Keyframes</td>
<td>Set to automatic.</td>
</tr>
<tr>
<td>Pixels</td>
<td>Encode using isomorphic (square) pixels (1 x 1).</td>
</tr>
</tbody>
</table>
How to fill out the Local Content form

Once you select your format(s), you will be able to fill out the following fields in the Local Content form:

- **Title**: Enter your title here.
- **Sort title**: This field will fill in automatically, based on your entered title. You can edit it as needed.
- **Subtitle**: Enter your subtitle (if any) here.
- **Series**: If your title is part of a series, enter the series name here.
- **Publisher**: Any publisher(s) you’ve previously entered will appear in a drop-down menu. You can select one from the drop-down, or enter a new publisher.
- **Subject(s)**: For audiobooks and eBooks, select a category from the “Fiction/Nonfiction” drop-down, then select at least one additional subject. For music and video, select at least one subject.
- **Language(s)**: Enter the language(s) for your title.
- **Short description**: This description will accompany the title on your public-facing site.
- **Cover image**: Click **Browse** to upload a cover image.
- **Thumbnail image**: Click **Browse** to upload a thumbnail image.
- **DRM**: For MP3, WMA, and WMV formats, the DRM settings are predetermined.
- **Geographic rights**: Enter the country or countries where you have rights to publish this title.
- **Ready for lending date**: Enter the date at which you’d like the title to appear on your public-facing site.

*Note: All files for your title must be processed by OverDrive before the title can go live. If you enter today’s date as your “Ready for lending date,” the title will appear on your public-facing site as soon as all associated files have been processed.*

- **Creator**: Add as many creators as you’d like (e.g. author, editor, translator, illustrator, etc.) by clicking the **+Add another** button.

- **Identifier**: Select and enter an identifier type (e.g. ISBN) for your title.
Local Content terms and conditions

Before you can submit Local Content for OverDrive to process, you will need to review and accept the following terms and conditions:

OverDrive, Inc. and Digital Library Reserve, Inc. (collectively "OverDrive") provide Authorized Users and Libraries of the system (collectively "Library") the ability to upload digital content for circulation in the Library's DLR collection.

Library represents that any digital content or materials including text, images, sound, and video (collectively "Local Content") that it deposits in its DLR account shall comply with the following terms and conditions:

1. Library acknowledges that OverDrive does not review or evaluate the Local Content in any matter whatsoever, including subject matter, substance, or accuracy of the content.

2. Library warrants and represents that it has the necessary ownership rights, licenses and/or permissions to deposit the Local Content into the Digital Library Reserve system. Library warrants and represents that the Local Content does not violate the proprietary rights of others, including but not limited to contract, copyright, and trademark. Library warrants and represents the Local Content does not contain matter which is libelous, slanderous, an invasion of privacy, unlawful appropriation of name, and likeness and defamation of character.

3. Library acknowledges that OverDrive provides certain services for applying copyright protection for the Local Content. Library is solely responsible for designating any and all copyright protection settings applied to the Local Content. OverDrive makes no representations or warranties as to the effectiveness of any such software or services as applied to the Local Content.

4. Library agrees to hold OverDrive, its agents, officers, and directors, harmless in any and all matters for any claims related to the upload, deposit, or distribution of Local Content in the Digital Library Reserve system.

5. OverDrive, in its sole discretion reserves the right, without notice, to reject or remove any and all Local Content deposited by Library, if in OverDrive's sole opinion it reasonably believes the Local Content will expose OverDrive to any action, liability, damage, and/or potential exposure to third party claims.
How to save your work for later

At any time, you can save your work by clicking the **Save work in my queue** button at the bottom of the form.

You can then return to the form at any time by selecting **Continue work** under the **Local Content** tab.

If you want to clear the form and start over, select **Clear my queue** under the **Local Content** tab.
Where to find your Local Content title in Marketplace

To find one of your Local Content titles in Marketplace, go to the Local Content tab, then select Edit a title to see a list of all your Local Content titles.

Please note that the Edit a title option will be grayed out if you are currently working on adding a new title, since only one title can be added or edited at a time. In this case, you must finish adding your title or select Clear my queue in order to be able to select Edit a title.

What to do if we couldn’t process your Local Content file(s)

If we were not able to process one or more formats for your Local Content title, there was likely an issue with the source file you submitted for that title.

In these cases, a red message may appear on the details page for your title in Marketplace that says something like this:

We were not able to process the Adobe PDF eBook version of this title.

Choose Edit to upload a revised file.

To help correct this issue, we recommend validating all EPUB eBooks using an EPUB validator (like this one), and opening failed PDF eBooks in Adobe Acrobat, then thumbing through all the pages to see if a warning dialog pops up. If it does, then there is an error with your PDF. Sometimes this can be solved by resaving your file. There are also programs that can help you validate PDFs, such as Adobe Acrobat Pro.

While it’s not a guarantee, a general guideline is that if your source file can be opened in Windows Media Player (for audio and video files) or in Adobe Digital Editions (for EPUB and PDF eBooks), it’s likely that our ingestion process will accept your file.

If these tips don’t resolve your issue, please contact your OverDrive Account Specialist (whose contact information is listed under the Support tab) so we can investigate further.
How to edit a title

If you’d like to edit an already-published Local Content title, select Edit a title under the Local Content tab. Please note that this option will be grayed out if you are currently working on adding a new title, since only one title can be added or edited at a time.

Once you select Edit a title, you will see a list of all Local Content titles published under your Marketplace account. Select one of the buttons next to that title to edit, add a format, delete, or delete a format for that title.

Note: Once you delete a format for a Local Content title, you cannot re-upload that format for that title.

How to remove a Local Content title from your digital collection website

Contact your OverDrive Account Specialist (whose contact information is listed under the Support tab) to have Local Content titles removed from your digital collection website. In your request, please include the title and creator of the work(s) you’d like deleted.

Please note that even if you delete a Local Content title from your OverDrive Marketplace account, you still need to contact your OverDrive Account Specialist to have the title removed from your public-facing website.
Local Content: Introduction to EPUBs

What is EPUB?

EPUB is the industry standard format for eBooks and other digital publications. The EPUB standard is developed and maintained by the International Digital Publishing Forum (IDPF), the global trade and standards organization for the digital publishing industry. An EPUB is a package of structured web content (including HTML5, CSS, SVG, images, and more), bundled into a single file that is easy to distribute and is compatible across a range of EPUB-compliant reading devices and applications.

For more information about the EPUB standard, we recommend visiting the official [IDPF website](https://epub.org). What is EPUB?

Why EPUB?

EPUB eBooks are reflowable, meaning that the text automatically resizes to fit each device’s screen (unlike PDFs, where the user has to zoom in and out to adjust text size). EPUB eBooks are compatible with a wide variety of devices and applications, including OverDrive’s mobile app, [OverDrive Media Console](https://www.OverDrive.com), which is available for Android, iOS (iPhone/iPad/iPod touch), Windows Phone, Windows 8, BlackBerry, Kindle Fire devices, NOOK tablets, and Kobo tablets. Furthermore, the current EPUB standard, EPUB 3.0, allows for sophisticated features such as complex layouts, multimedia elements, and interactivity.

In addition, OverDrive can ingest EPUB files to create eBooks in [OverDrive Read](https://www.OverDrive.com) format. This means that EPUB eBooks you submit through Local Content will be made available to library users in both EPUB and OverDrive Read formats.

How do I create EPUBs?

EPUB creation tools

There are many paths to creating your own EPUB eBooks for a variety of costs and skill levels. For example, you can create and export EPUB files using [Adobe InDesign](https://www.adobe.com/products/inDesign), and EasyPress Technologies provides an online EPUB creation tool called [Atomik ePublisher](https://www.atomikepublisher.com).

EPUB conversion

Several competent firms provide flexible, cost-effective options to convert current or backlist titles to a variety of eBook formats, including EPUB. Such firms include [Aptara](https://www.aptara.com), [Innodata-Isogen](https://www.innodata-isoft.com), and [Jouve](https://www.jouve.com), among many others. These are good options to consider if you are looking to convert a large catalog to EPUB.

EPUB validation

You can use an EPUB validator to check for errors in your completed EPUB. We recommend the [IDPF’s EPUB validator](https://validator.idpf.org).
Select Express

Our Select Express tools allow you to streamline and automate the processes of selecting and ordering content in OverDrive Marketplace. These tools save time and take the guesswork out of collection development by automatically building carts or submitting purchase orders according to your specifications. Additionally, Holds Manager and RTL (Recommend to Library) Manager allow your users or students to help drive your purchasing decisions through their holds or recommendations.

Below are getting started instructions and best practices for using each of the four Select Express tools: Holds Manager, Publisher Presale Plans, RTL (Recommend to Library) Manager, and Smart Lists.

Your Collection Development Specialist is also always available to provide further assistance in building Select Express plans that fit your needs.

**Note:** You must have “Holds Manager,” “Publisher Presales,” “RTL Manager,” or “Smart List” permissions in order to access these tools.

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**Holds Manager**

At your digital collection website, demand builds as your users or students place titles on hold. Holds Manager lets you respond to this demand quickly and easily by building carts or automating orders based on holds.

Every time your Holds Manager plan runs, you can have it create a cart for your review. Or, Holds Manager can automatically place a holds-driven order on your behalf. Each time your plan runs, you'll be notified by email.

You can create one Holds Manager plan for all holds, or you can create a separate Holds Manager plan for each format (eBook, audiobook, music, or video) available at your library or school.

To get started, select **Holds Manager** under the **Select Express** tab. From here, you can click the **Create new** button to create a new plan, or select an existing plan and click **Edit**.

You’ll be asked to answer the following questions when creating or editing a Holds Manager plan:

**User demand and budget**

- **Do you want to fill holds based on the number of holds or by holds ratio?**
  We recommend filling holds based on holds ratio since it takes into account how many copies of a title you already own.

- **Do you want to limit how much you spend each calendar month?**
  If you set a limit on how much you want to spend fulfilling holds through Holds Manager each month, Holds Manager will stop adding titles to your cart or purchase order when that limit is
reached for a given month.

- **Do you want to limit the copy(s) purchased for a given title?**

**Collection development policies**

- **Do you want to limit by format?**
  Select Yes if you would like to create a separate Holds Manager plan for each format (eBook, audiobook, music, or video) available at your school or library.

- **Do you want to include Metered Access titles?**

- **Do you want to exclude certain publishers?**
  To exclude titles from a specific publisher, select that publisher from the “Include publishers” list, then click the right arrow to move that publisher to the “Exclude publishers” list.

[Include publishers list]

To restore an excluded publisher, select that publisher from the “Exclude publishers” list, then click the left arrow to move it back to the “Include publishers” list.

**Scheduling**

- **How often do you want this plan to run?**
  You can have your Holds Manager plan run (meaning that it will create a new cart or submit a new purchase order) once a day, once a week, twice a month, or once a month. We recommend running Holds Manager plans at least once a week to stay on top of demand.

- **On what date do you want this plan to run for the first time?**

- **If desired, please enter an internal purchase order ID.**
  This is an optional field where you can enter an ID that will print on any invoices for carts or orders created by your Holds Manager plan. This is for your records only.

- **When this plan runs, do you want it to save a cart for your review or submit an order on your behalf?**
If you have Holds Manager save carts for your review, you will find those carts on your View Carts page. Carts created by Holds Manager are blue, and have “Holds Manager” listed as their “Cart type.”

![Holds Manager](image)

Or, you can have Holds Manager directly submit orders on your behalf. In this case, you will see information for these orders in your invoices and in your purchase order history, but you won’t see carts on your View carts page.

- **If desired, please name your cart/order.**
  This is an optional field where you can enter a descriptive name for the carts or purchase orders that will be created by your Holds Manager plan.

When you’re ready, select the **Continue** button to complete your Holds Manager plan.

![Continue](image)

You’ll be taken to a confirmation page where you can review the terms of your plan. If these are all correct, select **Save this plan.**

![Save this plan](image)

You can also click **Cancel** to return to the Holds Manager form and edit your plan (your previous settings will be saved).

If you have any questions about Holds Manager, please contact your Collection Development Specialist.
Publisher Presale Plans

Select audiobook publishers offer advance notice of their upcoming releases and rank those releases by anticipated popularity. Publisher Presale Plans allow you to automatically order a set number of these top-ranked new releases on a monthly basis. Those new releases will be added to your digital collection on the first of each month.

Two weeks before the first of the month, you’ll receive an email notification for each of your Publisher Presale Plans that will let you know which titles you’re scheduled to receive for the coming month and the estimated cost of that order. At that point, you can edit your Publisher Presale Plan(s) as needed.

For example: Publisher A may offer a monthly list of 20 top-ranked upcoming titles, and you might set up a Publisher Presale Plan to add the top 5 out of those 20 titles to your digital collection each month. If for a certain month you’d prefer to receive a different 5 titles out of those 20, you can make those changes to your order in Marketplace before the first of the month.

To get started, select Publisher Presale Plans under the Select Express tab. From here, you can click the Create new button to create a new plan, or select an existing plan and click Edit.

When creating a new plan, you’ll be prompted to pick a publisher.

Next, select the number of copies you’d like to receive of each top-ranked title from that publisher each month.
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In the example above, the library or school is scheduled to receive five copies of this publisher’s #1 upcoming title each month, and one copy each of the #2, #3, #4, and #5 upcoming titles each month. You can also order copies of all top-ranked titles from each publisher, if desired.

Under “For your records,” you can enter an optional cart name and/or internal purchase order ID that will show up with your monthly order.

When you’re ready, select **Save plan** to complete your Publisher Presale Plan.

If you have any questions about Publisher Presale Plans, please contact your Collection Development Specialist.
RTL (Recommend to Library) Manager

If you’ve enabled the “Recommend to Library” feature on your public-facing site, your users can recommend that you purchase titles that are not yet part of your digital collection. RTL Manager allows you to respond to this demand quickly and easily by building carts or automating orders based on recommendations.

Every time your RTL Manager plan runs, you can have it create a cart for your review. Or, RTL Manager can automatically place a recommendation-driven order on your behalf.

You can create one RTL plan for eBooks and one RTL plan for audiobooks, or you can create a single RTL plan that covers both formats.

To get started, select RTL Manager under the Select Express tab. From here, you can click the Create new button to create a new plan, or select an existing plan and click Edit.

You’ll be asked to answer the following questions when creating or editing an RTL Manager plan:

User demand and budget

- **How many users need to recommend a title before you order it?**
  We recommend that you set this limit at Just 1 in order to include all user recommendations, and then review each cart and remove titles as needed before ordering.

- **Do you want to limit how much you spend each calendar month?**
  If you set a limit on how much you want to spend fulfilling recommendations through RTL Manager each month, RTL Manager will stop adding titles to your cart or purchase order when that limit is reached for a given month.

- **Do you want to cap the number of copy(s) on titles in your collection?**

Collection development policies

- **Do you want to limit by format?**
  Select Yes if you would like to create separate RTL Manager plans for eBooks and audiobooks.

- **Do you want to include Metered Access titles?**

- **Do you want to exclude certain publishers?**
  To exclude titles from a specific publisher, select that publisher from the “Include publishers” list, then click the right arrow to move that publisher to the “Exclude publishers” list.

  To restore an excluded publisher, select that publisher from the “Exclude publishers” list, then click the left arrow to move it back to the “Include publishers” list.
Scheduling

- **How often do you want this plan to run?**
  You can have your RTL Manager plan run (meaning that it will create a new cart or submit a new purchase order) once a day, once a week, twice a month, or once a month. We recommend running RTL Manager plans at least once a week to stay on top of demand.

- **On what date do you want this plan to run for the first time?**

- **If desired, please enter an internal purchase order ID.**
  This is an optional field where you can enter an ID that will print on any invoices for carts or orders created by your RTL Manager plan. This is for your records only.

- **When this RTL (Recommend to Library) plan runs, do you want it to save a cart for your review or submit an order on your behalf?**
  If you have RTL Manager save carts for your review, they will show up in blue on your View Carts page.

  Or, you can have RTL Manager directly submit orders on your behalf. In this case, you will see information for these orders in your invoices and in your purchase order history, but you won’t see a cart on your View carts page.

- **If desired, please name your cart/order.**
  This is an optional field where you can enter a descriptive name for the carts or purchase orders that will be created by your RTL Manager plan.

When you’re ready, select the **Continue** button to complete your RTL Manager plan.

You’ll be taken to a confirmation page where you can review the terms of your plan. If these are all correct, select **Save this plan**.

You can also click **Cancel** to return to the RTL Manager form and edit your plan (your previous settings will be saved).

If you have any questions about RTL Manager, please contact your Collection Development Specialist.
Smart Lists

The Smart List is a powerful collection development aid and time-saving tool that automatically generates lists of titles in Marketplace that are best suited to your collection’s needs.

Smart Lists automatically build carts based on criteria you specify, including price, date added, most desired genres and subjects, popular authors and series, press attention, languages, and more. You can then review these carts, edit them as needed, and place orders with a single click.

You can create as many Smart Lists as you like. Please note that Smart Lists will not submit purchase orders automatically on your behalf. Instead, you will always have the chance to review carts generated by Smart Lists before placing orders. Carts created by your Smart Lists will appear in blue on your View Carts page.

We encourage you to contact your Collection Development Specialist for personal assistance in setting up Smart Lists.

You can also get started by selecting Smart Lists under the Select Express tab. From here, you can click Add Smart List to create a new Smart List, or select an existing list and click Edit.

At any time, you can also select a list you’ve created and click Run now to generate a current version of that Smart List within five minutes.

You’ll be asked to answer the following questions when creating or editing a Smart List:

**User demand and budget**

- **Do you want to limit the number of titles to include on this Smart List?**
  We recommend setting a limit on the number of titles included in each Smart List based on how many titles you feel comfortable reviewing at a time.

- **Do you want to limit how much you spend per month?**
  We recommend selecting No limit since you will have the chance to review each Smart List before ordering and remove titles as needed then.

- **How many copy(s) of each title should be added?**

- **Do you want to cap the number of copy(s) on titles in your collection?**

- **Do you want to exclude titles based on price?**

- **This Smart List could create a large cart. How would you like the titles sorted?**
  You can have your Smart List display titles sorted by popularity, current demand, price, street date, and more. This is especially helpful for longer Smart Lists.
Smart List specifics

- **Do you want to limit by format?**
  Select Yes if you would like your Smart List to only include titles in a certain format or formats.

- **Do you want to include Metered Access titles?**

- **Advanced filters**
  To apply advanced filters to your Smart List, pick your desired criteria from the “Include all” windows on the left, then click the right arrow to move those criteria to the “Include only” windows on the right.

  Your Smart List will only include titles that meet all of the criteria in all of the “Include only” windows.

  When selecting advanced filters, be careful not to choose conflicting filters, or you may end up with an empty Smart List. For example, do not select both “New to Content Reserve – last 7 days” and “Top 1000 by sales – all libraries,” because it’s unlikely that any titles will meet both of those criteria.

Scheduling

- **Plan status**
  You can mark a Smart List as “Inactive” if you’d like to stop running it for now, but would still like to save it for later.
• **On what date do you want this Smart List to run for the first time?**
The earliest date you can schedule your Smart List to begin running is the following day; however, if you would like to run your Smart List immediately, finish creating it and then select **Run now** from the Smart Lists homepage.

• **After this Smart List runs for the first time, how often do you want it to run going forward?**
We recommend running your Smart Lists at least weekly.

**For your records**

• **Name this Smart List.**
This is how the Smart List will be listed on your Smart Lists homepage.

• **Name the cart that will be created by this Smart List.**
This is an optional field where you can enter a separate name for the carts that will be generated by this Smart List.

• **If desired, enter an internal purchase order ID.**
This is an optional field where you can enter an ID that will print on any invoices for carts that you order that were created by your Smart List. This is for your records only.

When you’re ready, select the **Save** button to save your Smart List.

You’ll be taken to a confirmation page where you can review the terms of your Smart List. If these are all correct, select **Save this plan.**

You can also click **Cancel** to return to the Smart List form and edit your plan (your previous settings will be saved).

If you have any questions about Smart Lists, please contact your Collection Development Specialist.
MARC records

If you have “Cataloging” permission, you can manage all of your MARC record preferences under the MARC tab. Here you can:

- Review your options for ordering MARC records
- Request sample files for the different MARC options
- Order MARC records for your Simultaneous Use and Metered Access titles

OverDrive MARC Express

OverDrive MARC Express offers ready-to-load MARC records to your library at no cost. We create these minimum MARC records in-house and deliver them to an OverDrive-hosted FTP site the day after you place a content order. Your library can then load the record as is, or edit to suit your specific needs. It’s a fast, free way of getting records into your catalog and synchronizing it with your OverDrive digital collection.
Reports

OverDrive Marketplace reports can help you evaluate your library’s activity and make informed purchases. We will be adding additional reports in the future, and you can always refer to this guide for the most up-to-date report information. When a new report is added, we’ll post an alert under the News tab in OverDrive Marketplace.

A few helpful tips:

- You may see the option to distinguish between standard and mobile websites. “Standard” means the site was accessed from a desktop or laptop computer, and “mobile” means it was accessed from a mobile device (such as a smartphone or tablet).

- If a report does not require a start date, it will start at the inception of your digital library. Leaving the end date blank will run the report through the present day.

- You can export most reports by selecting Create worksheet at the top or bottom of the results page. When creating a worksheet, you may see additional information beyond what is included in the web view. If you’re using Excel, and the ISBNs are not being displayed correctly, please follow these steps to resolve the issue:
  1. Open Excel and press Ctrl + O (Command + O on Macs) on your keyboard.
  2. When the browsing window opens, select Text Files from the drop-down menu to the right of the “File name” field.
  3. Browse to and open the CSV file from OverDrive Marketplace. The “Text Import Wizard” opens.
  4. Make sure the Delimited option is selected in the wizard, then click Next.
  5. Make sure Tab is unchecked, and check Comma. Click Next.
  6. Select Text, then click Finish to open your CSV file.

- Those libraries who are part of a shared collection may have the option to select their branch only (in addition to all branches) for some reports, including:
  - Current waiting list
  - Circulation activity
  - Recommendations
  - New user registrations
  - Unique user activity
Collection Usage reports

Current waiting list

View each title that currently has a waiting list, with the option to delineate between standard versus mobile use (i.e., visitors on laptop and desktop computers versus visitors on mobile devices). When running the report, you’ll also see the average wait period so you can get an estimate of how many days your users spend on a waiting list.

Circulation activity

View all checkouts for any specified date range. You can choose to view your checkouts by day, month, publisher, format, title, or subject. You may also be able to narrow your report to only show checkouts from a specific lending model (e.g. One Copy/One User), website type, or format. You will be able to narrow your report by patron type or inventory flag type (e.g. “Appropriate for juveniles”) if your library has made such distinctions.

In some versions of this report, you will see format categories for “Pending – eBook” and “Pending – Audiobook.” “Pending” represents checkouts for which a format has not yet been selected (e.g. a user borrows an eBook but has not yet chosen EPUB or PDF). Checkouts will remain in the “Pending” category until the user selects a format. If the loan expires before then, the checkout will remain as “Pending.”

Note that there may be discrepancies when comparing a report run for “All lending models” and specific lending models; titles that were previously owned under the Simultaneous Use mode are excluded when running this report for individual lending models.
Project Gutenberg activity

You can view the number of downloads for Project Gutenberg titles by day, month, title or subject, as well as website type.

Recommendations

If your library has enabled the RTL (Recommend to Library) feature on your public-facing site, you can use this report to view your users’ recommendations.

Collection statistics

View your overall number of titles, licenses, checkouts, and holds for titles originally purchased within a date range you specify. If a title was originally purchased outside the specified date range, but additional copies were purchased during the specified date range, the title will still be excluded from this report.

You can also use this report to view titles purchased within your specified date range that have a minimum or maximum number of checkouts (for example, all titles that have been checked out a minimum of 50 times). There are many options by which to sort, including turnover rate.

Library statistics

This report gives an overall snapshot of your library activity. Use it to view your total titles owned, checkouts, holds, and unique users with checkouts (unique user meaning each user only counts once, no matter how many titles he/she checks out).
Most viewed titles

This report displays your 50 most viewed titles on your digital library site within the past 30 days. Your most viewed titles are calculated based on the number visits to each title’s details page.

Website Statistics reports

Top referrer URLs

This report provides some insight into how your users are finding your digital library site by providing your top 50 referrer URLs (the URLs from which users are accessing your site).

Some reports may include a data point for “Referrer not detected,” which covers cases where your site was accessed from a source with no URL (such as a browser bookmark, an email link, user typed your URL in their browser, etc.) and cases where the referrer URL was blocked through the user’s browser or proxy server settings.

Most viewed pages

This report displays the 50 most viewed pages on your digital library site within the past 30 days.

Purchases & Subscriptions reports

Purchase order history

View your past purchase orders, with the ability to search by name, order ID, internal order ID, or order type (Holds Manager, Publisher Presale Plan).

Content credit order history

View all content credit purchased by your library, with the ability to search by time period, billed account, credited account, and internal order ID.

Simultaneous Use orders

View your library’s Simultaneous Use subscription orders, with the ability to search by cart name, subscription plan, and internal order ID.

MARC record orders

View all of your library’s MARC record orders to date.
Recalled content

There may be occasions when purchased content is recalled (for example, if the digital rights for a title were incorrect. With this report, you can view details on recalled content, including the title(s), purchase details, and the credit issued for recalled titles.

User Statistics reports

Search checkouts

Search for and view checkouts by ID, library card number, or title. You can also reset download links for titles on a case-by-case basis.

New user registrations

This report displays the number of people who log in to your digital library site for the first time. Users do not have to check out titles to be counted in this report; they only need to visit your site and log in. We recommend running this report before, during, and after promotional events to see how many new users log in compared to previous periods.

User traffic

View statistics on user traffic at your digital library site, including the number of active visits (unique user sessions) and page views per day.

Unique user activity

View how many users have checked out titles from your library by day or month. We recommend comparing this report with the New user registration report to look for matching trends.

To determine how many unique users accessed your site in a month, make sure you view unique users by month. If you tally your unique users by day for the same period, you may get a higher figure for that month, since users who logged in on multiple days would be counted multiple times.
Running reports with Advantage titles

If your library is part of a consortium and has purchased Advantage titles, Advantage-specific columns will appear when applicable. You can also run the Current waiting list, Circulation activity, and Collection statistics reports to focus solely on your Advantage titles. You can then run the report again with all titles to see what percentage of checkouts and holds are your Advantage titles.

For the Collection Statistics report, you must be logged in as an Advantage account to see your Advantage titles. Please note the Library Statistics report will display results for all Advantage accounts in your library system, not just your account.
**Invoicing**

If you have “Invoicing” permission, you can submit invoicing questions using the invoicing support form located under the **Invoicing** tab. You can also access other invoicing-related resources and forms under this tab.

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**News**

Critical alerts are located under the **News** tab. When you receive new alerts, red notifications will appear on the **News** tab.

As you open and read alerts, you can archive them by clicking **Archive**. Notifications will disappear from your **News** tab as you read each alert. Access your archived alerts at any time by opening the **News** tab and clicking **View archived alerts**.

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**Alerts**

No new alerts have been posted. Check back often to keep up on the latest from OverDrive.

[View archived alerts]

Under **News**, you can also:

- View upcoming OverDrive-hosted events under **Events**
- Connect with us through social media under **Connect with OverDrive**
- Sign up to receive our email newsletters under **Publications**
Support

Under the Support tab, you’ll find personalized contact information for your library’s OverDrive team, as well as links to:

- Marketplace User Guide
- Marketplace Quick Start Shopping Guide
- OverDrive Help
- OverDrive Learning Center
- Marketing and Outreach resources
- Our web support form

You’ll also find end-user support tools that allow you to Manage holds (requires “End-user support” permission), Return titles (requires “End-user support” permission), and Reset downloads for your library users.

Manage holds

You must have “End-user support” permission to use the Manage holds feature. If you don’t have this permission, contact your library’s Marketplace administrator to have them either add this permission to your account or direct your request to the appropriate party.

To cancel a user’s hold or move a user up or down the holds list for a specific title, follow these steps:

1. Select the Manage holds button under the Support tab.
2. In the “Search” window that opens, locate the desired hold by entering the title, barcode, or user email address for the hold, then click Search.
3. Click the pencil icon next to a hold to edit or remove that hold.

Return titles

You must have “End-user support” permission to use the Return titles feature. If you don’t have this permission, contact your library’s Marketplace administrator to have them either add this permission to your account or direct your request to the appropriate party.

To return a title from a user’s account before the end of the lending period, follow these steps:

1. Select the Return titles button under the Support tab.
2. In the “Search” window that opens, locate the desired title by entering the title, barcode, or user email address, then click Search.
3. Select the title(s) you’d like to return to your collection, then click Return title(s).
Reset downloads

To reset a user’s download link for a title that they currently have checked out, but for which they’ve exhausted the download limit, follow these steps:

1. Select the *Reset downloads* button under the *Support* tab.

2. Locate the checked-out title by entering the barcode, title, or checkout ID, then click *View report*.

3. Click the *View* link next to the title.

4. On the “Checkout details” page that opens, click *Reset user’s download link*.

Please note that only active loans that have been downloaded the maximum number of times can be reset. If you don’t see a *Reset user’s download link* button, either the download link is still active or the title has been returned to the library.
Editing your contact information

Select **Contact information** from your name drop-down menu in the upper-right corner of OverDrive Marketplace.

In the popup that opens, you can:

- Change your contact name
- Change your contact email address
- Reset your OverDrive Marketplace password. Passwords must be at least eight characters and contain three of the following: upper-case letter, lower-case letter, number, or special character

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Preferences

If you have “Preferences” permission, you can select **Preferences** from your name drop-down menu to:

- Allow users to place holds on Metered Access/metered by license content
- Display AudioFile reviews on your digital collection website
- Limit the number of titles users can recommend to you using the “Recommend to Library” feature
- Merge or separate the One Copy/One User and Metered Access catalogs in Marketplace. Please note that whichever preference you choose will be applied for all Marketplace users for your library or consortium.
- Determine the number of copies of Local Content titles that you’d like to make available on your digital collection website
Creating OverDrive Marketplace users

If you have administrative permission, you can select Users from your name drop-down menu to edit, add, or delete other OverDrive Marketplace users for your library.

Click the edit icon next to existing users to edit their user profile, resend their OverDrive Marketplace welcome email (containing their username and login instructions), or disable the Forgot your password? feature on their login page.

Click Add User to create a new user. A blank profile will open where you can assign your new user an OverDrive Marketplace username, contact email, and permissions, as well as an optional role description.
You can select individual permissions for each user, or choose one of three user roles: shopping (includes permissions listed under Shopping), buying (includes permissions listed under Buying and Shopping), or admin (includes all permissions).

Please note that you cannot create a user who has permissions higher than your own.

To create a user who can only submit support requests, leave all user permissions unselected. The user will only be able to access the Support and News tabs, which are the default permissions.

User permissions

Admin

- **End-user support**: Users have access to the Manage holds feature (so they can move end users’ positions in holds queues) and the Return titles feature (so they can return borrowed titles to your collection from end users’ accounts).

- **Reports**: User can view, run, and export all reports under the Reports tab.

- **Invoicing**: User has access to the Invoicing tab, where they can submit invoicing questions and download other invoicing-related forms.

- **Users**: User can create, edit, or delete other OverDrive Marketplace users for your library or school.

- **Local content**: User can upload and publish your own eBooks, audiobooks, music, or video titles for lending at your public-facing site. User can also edit, delete, add formats, or delete formats for existing Local Content. See the Local Content section of this guide for more details.

- **Preferences**: User has access to Preferences settings for your library, including the ability to merge or separate the One Copy/One User and Metered Access catalogs in OverDrive Marketplace. See the Preferences section of this guide for more details.

- **Cataloging**: User has access to MARC tab, where they can handle settings and subscriptions for MARC records.

Buying

- **RTL Manager**: User can create RTL (Recommend to Library) Manager plans that automatically create and/or purchase carts based on titles recommended by library patrons or students. See the Select Express section of this guide for more details.

- **Smart List**: User can create Smart List plans that automatically build carts based on your chosen criteria. See the Select Express section of this guide for more details.
- **Purchase:** User can purchase shopping carts and content credit. Users with this permission will also receive email notifications regarding Metered Access titles and Simultaneous Use plans. If you enable this permission, you will be required to choose a billing account for that user’s purchases.

- **Publisher Presales:** User can create Publisher Presale plans to automatically order top-ranked titles from select publishers on a monthly basis. See the Select Express section of this guide for more details.

- **Holds Manager:** User can create Holds Manager plans that automatically create and/or purchase carts based on titles with holds placed by users at your library or school. See the Select Express section of this guide for more details.

### Shopping

- **Delete carts:** User can delete unlocked shopping carts from the View Carts page. See the Carts section of this guide for more details.

- **Create/view carts:** User can create new shopping carts in OverDrive Marketplace and view other users’ carts. They can also edit unlocked carts created by other users. See the Carts section of this guide for more details.
Need more help?

If you need more help with OverDrive Marketplace, please contact us using the support form located under the Support tab.

Support

Use our Support form to contact us.