Getting Started with OverDrive Marketplace

Your hub for digital content

Presented by Training Specialists:
Lisa Mullins & Lauren Bajda
Where can I see the recording?

Follow-up Email

How do I ask a question?

Q&A Button

How do I get “credit” for this session?

Shared at the end & follow-up email
01 Overview
Marketplace
Lending models

02 Demo
Browse content
Create carts
Purchase titles

03 Resources
Help
Training

04 Next Steps
Success
Start today
01
Overview
OverDrive

Marketplace

Over 2.9 million ebooks, audiobooks, videos and magazines to purchase for your digital library.

marketplace.overdrive.com
For login or Marketplace permissions help, contact your OverDrive Account Manager.
Marketplace users

User permissions

- Admin
  - End-user support
  - Reports
  - Manage invoices
- Users
- Local content
- Weeding
- Content access levels
- Title assignments
- School site admin
- Curate
- Marketplace settings
- Sora activity

Purchasing
- RTS Manager
- Smart List
- Purchase
- Holds Manager
- MARC preferences

Shopping
- Delete carts
- Create/view carts

All users will have the option to view the Support and News tabs. Requires 'Create/view carts' permission.
Lending models

- One Copy / One User
- Metered Access
- Cost per Circ
- Simultaneous Use
- Class Sets
One Copy / One User

Metered Access

Cost per Circ

Simultaneous Use

Class Sets

Checked out to one user at a time

Never expires
One Copy / One User

Metered Access

Cost per Circ

Simultaneous Use

Class Sets

Checked out to one user at a time
Expires after determined period
One Copy / One User

Metered Access

Cost per Circ

Simultaneous Use

Class Sets

Borrowed simultaneously by unlimited number of users
Only pay when users borrow titles, until budget runs out
One Copy / One User

Metered Access

Cost per Circ

Simultaneous Use

Class Sets

Checked out to unlimited number of users simultaneously
Expires after determined period
One Copy / One User
Metered Access
Cost per Circ
Simultaneous Use

Class Sets

Purchase exact number of copies you need for a length of time
Expires after Class Set period ends
## Lending models

<table>
<thead>
<tr>
<th><strong>ONE COPY/ONE USER</strong></th>
<th>Titles borrowed by one user at a time. Never expire from the collection.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>METERED ACCESS</strong></td>
<td>Titles borrowed by one user at a time. Expire after a set period of time. Metered by time, checkouts, or both.</td>
</tr>
<tr>
<td><strong>COST PER CIRC</strong></td>
<td>Pay only when title is borrowed. Titles can be borrowed simultaneously until budget runs out.</td>
</tr>
<tr>
<td><strong>SIMULTANEOUS USE</strong></td>
<td>Titles can be borrowed simultaneously. Usually expire after a set time. Project Gutenberg titles never expire.</td>
</tr>
<tr>
<td><strong>CLASS SETS</strong></td>
<td>Title “rental” model. Automatically check out/in to student. Expire after a set period of time.</td>
</tr>
</tbody>
</table>
Demonstration
Poll

Have you signed in to Marketplace?

- Yes
- No
- Unsure
Poll

How can you browse and search for titles in Marketplace?

- Admin tab
- Advanced search
- Advanced search drop down
- Featured tab
- Insights
- Search presets
- Search within different lending models
- Quick search
Poll

How many units of this title are owned in the Metered Access lending model?

- 0
- 7
- 67
- 9
Poll
True or false? You can copy or move titles from one cart to another.

- True
- False
Navigating Marketplace

Library / School
Getting Started how-to video

Getting Started
Marketplace Help articles
Ways to search in Marketplace

- Quick & advanced search
- Lending models
- Must-haves
- Saved searches
- Top 200 insights
- Featured tab
- Search presets

Searching for Titles
how-to video

Search
Marketplace Help articles
Refining and understanding results

Refine search results:
- Filter
- Edit
- Sort

Understand title information:
- Review title information
- See if it’s owned or pending
- View stats at shared collection or advantage level

Refining and Understanding Search Results
how-to video

Search
Marketplace Help articles
Understanding title information

Title, author, BISAC codes, and more!

Add [title] to a new or existing shopping cart.

Price per unit

Lending model(s)

Format(s) available

How many copies of [title] your library owns, broken down by lending model: OC/OU (One Copy/One User), MA (Metered Access), SU (Simultaneous Use), and CPC (Cost per Circ).

How many copies of [title] in your collection are currently on hold or suspended.

How many copies of [title] in your collection are currently checked out.

Number of holds in your collection over number of copies you own.

One or more copies of [title] has been added to a cart, but not purchased yet.
Understanding title information (Advantage)

Advantage information shown in second row.

Library / School
Advantage how-to video
Creating carts

How to create a cart:

1. Click Create Cart at top of screen or select a title and click Add to New Cart.
2. Create a unique and meaningful name.
3. Add titles.

You can create as many carts as you like, but you can only pin five carts at a time (per lending model).

Creating and Editing Carts
how-to video

Carts
Marketplace Help articles
Editing carts

How to edit a cart:

1. Go to Carts page and click the pencil icon on the cart you want to edit.
2. Open the cart to edit the carts contents.

Carts are automatically deleted when they meet one of seven criteria.
Automating carts

Automating Carts
how-to video

Automating Carts
Marketplace Help articles
Reviewing carts

How to review a cart:
1. Click on cart to view cart details page.
2. From here you can:
   - Update # of copies
   - Create worksheet
   - Copy, move, and delete titles
   - Add/remove columns
   - Expand and sort columns
   - Review title information
   - Create quote

*A cart’s total will be “TBD” if you haven’t yet chosen a lending model for one or more titles in the cart.*
Purchasing carts

How to purchase a cart:

- Click **Purchase cart**.
- Read and confirm the purchase conditions.
- Choose a payment method and follow the prompts to complete your order.

Your school won’t be invoiced for preorder titles until they reach their street dates.

Reviewing and Purchasing Carts
how-to video

Carts
Marketplace Help articles
Content access levels

Managing Content Access Levels how-to video

Content access levels
Marketplace Help articles
03

Resources
Resources

Learn more
Marketplace Help - help.marketplace.overdrive.com
Resource Center - resources.overdrive.com

Contact us
Reach out to your Account Manager

Join our email list today!
Did you know?

Your OverDrive team offers **training** to fit *your* needs and timeline:

<table>
<thead>
<tr>
<th>Live monthly webinars</th>
<th>On-demand webinars, 24/7</th>
<th>Thorough how-to videos</th>
<th>Custom 1:1 training</th>
</tr>
</thead>
<tbody>
<tr>
<td>• 30 minutes</td>
<td>• 30-60 minutes</td>
<td>• Most videos &lt; 7 minutes</td>
<td>• Custom topic</td>
</tr>
<tr>
<td>• Getting Started with Sora</td>
<td>• Rotating special topics</td>
<td>• Step-by-step instruction</td>
<td>• K-12 expert trainers, live</td>
</tr>
<tr>
<td>• Register in 30 seconds</td>
<td>• K-12 thought leadership</td>
<td>• Walk-throughs and demos</td>
<td>• Variable length</td>
</tr>
<tr>
<td>• Email follow-up with PDF</td>
<td>• Always available</td>
<td>• Follow-up resources</td>
<td>• Your choice of time/date</td>
</tr>
</tbody>
</table>

Register today
Library / School

Watch anytime
Library / School

Learn at your own pace
Library / School

Talk to an expert
Library / School
Next steps
Next Steps


2. Explore Marketplace, search for titles and create a new cart.

3. Discover resources at Marketplace Help and OverDrive’s Resource Center.
THANK YOU

OverDrive