

# OverDrive® ADVANTAGE CURATION

By default, the collection spaces on your library's Advantage website and in Libby display the same curated and automated collections as your consortium.

## What is curation?

A digital version of a book display. Curation increases discoverability by showing off titles in your collection. It can also help promote library programming, such as author visits, community reads, and local interests.

## Tips:

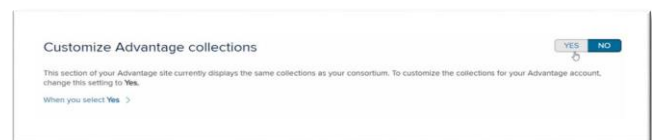
- Sort by available to make a great first impression by showing books that are ready to borrow.
- Save time by keeping seasonal collections as saved drafts. Remember to update with new purchases before republishing.
- Make sure collections have descriptive, eye-catching names.
- Keep the number of titles per collection between 25 and 200 for optimal loading time.

## Curate your own collections using these steps:

1. Log into your Advantage account.

**TIP:** You'll know it's the correct account because your username will have ".adv" in the middle and at the top of the page, your library details will show along with your consortium details

2. Select **Organize published collections** from the **Curate** drop-down menu in Marketplace.
3. Select the page on which you want to enable Advantage curation. To show them on your main Advantage home page, choose Main site: Home page.
4. **Toggle** the blue switch over to "Yes" under the Customize Advantage Collections page.
5. Follow the instructions farther below to curate collections for your *own* library!



## When you select "Yes":

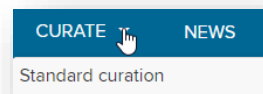
- You'll be able to create new collections for your Advantage patrons.

- Any titles added or removed from consortium-created collections that are live at the time Advantage curation is turned on will be updated on the collections as long as you don't make any changes. Once you edit or delete these consortium-created collections, they must be manually updated.
- If a collection is removed from the consortium page, it will not automatically be removed from the Advantage page, so a best practice is to only keep "evergreen" lists when you turn on Advantage curation.
- You won't receive new collections created by your consortium going forward.

### Curate collections: Standard curation

Curated collections are manually created and great for lists that are based on trends, current events, local authors, specific subjects, library events, etc. Examples include *Teen Thrillers*, *If you liked Where the Crawdad Sings*, and *Patriotic Reads for July 4*.

1. Select **Standard curation** from the Curate drop-down menu.



2. Click **Create standard collection**.

CREATE STANDARD COLLECTION

3. In the pop-up window that opens, choose **Curated** as your collection type, enter a collection **title**, an optional **description** for your collection, and click **Next**.

 A screenshot of a 'Create Collection' pop-up window. It has a title bar with 'Create Collection' and a close button (X). The form contains:
 

- 'Collection type:' section with two radio buttons: 'Curated' (selected) and 'Automated'. Below 'Curated' is the text 'Hand-picked titles typically based on a theme. Ex: Holiday Favorites, Gone Girl Readalikes'. Below 'Automated' is the text 'Auto-populating list based on specific criteria. Ex: Newly Added, Most Popular Audiobooks'.
- 'Collection name' text input field.
- 'Collection description' text input field.
- 'Pin as main collection' checkbox, which is checked.
- 'NEXT' and 'CANCEL' buttons at the bottom.

4. When you click Next, you'll be taken to your collection's details page. Here you can:

a. Pin the collection— you can only add titles to a pinned collection, and you can pin up to 10 collections at a time.

b. Edit your collection name and collection description (*note*: the collection description is visible to users).

c. Choose an availability filter to determine how titles will display based on availability.

d. Choose a publishing location to determine where the collections will appear on your OverDrive website and in Libby.

5. Click Save draft to save any changes you made on the collection details page.

SAVE DRAFT

**TIPS:****Availability Filter:**

Best practice is “show all titles, but show available first”, or if list is for available titles only, choose “available only”.

**Publishing Locations:**

Options with a location last (**in orange**) will display in that location—either the homepage for your collection (main site) or the homepage of your reading room (kids, teen, etc.).

**Note:** you’ll have to have the Advantage Curation switch turned to the “on” position for any publishing location you want to edit.

Options with a format—ebooks, audiobooks—last (**in green**), will display under “collections” for that format (see green options)

### Summary

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

Language  
English (Default)

Changes to the collection name and description will only affect the selected language.

Collection name  
Between 2 and 100 characters; visible to end users.  
Shelf Awareness Featured Titles

Collection description  
Up to 300 characters; this may be visible to end users.

Availability filter  
Show all titles, but show available first  
Show all titles  
Show available titles only  
Show all titles, but show available first

This is the order that titles in this collection will appear on your OverDrive site.

### Publishing locations

- Main site - Home page
- Main site - eBooks
- Main site - Audiobooks
- Main site - Magazines
- Main site - Videos
- Kids & Teens - Home page
- Kids & Teens - EBOOKS
- Kids & Teens - AUDIOBOOKS
- Kids & Teens - VIDEOS

- Next, search for titles to add to your collection with the search options at the top of the page or advanced search.

**Note:** Your search results will only contain titles that you already own.

Search for titles to curate by title, author, series, or publisher



Advanced search

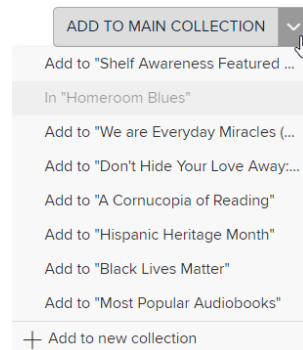


- From your search results, you can add a title to your main collection (this is your first pinned collection) by selecting Add to main collection.

ADD TO MAIN COLLECTION ▾

To add a title to a different pinned collection, select the collection from the drop-down menu.

- To review or edit your collection, return to the collection details page by clicking on the collection in the right-hand column (next to your search results). You can also click the View collections button to go back to the Standard curation page and open any collection.



- When you're ready to publish your collection, click Publish from the collection details page.

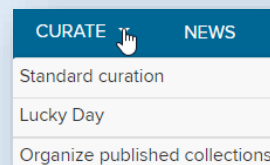
PUBLISH

- In the pop-up window that opens, click Publish again.

#### TIPS:

*Change order of collections on a page:*

- Navigate to **Curate > Organize published collections**.
- Click the page you wish to reorder along the **sidebar menu**.
- On the Organize published collections, **drag and drop** collections to change their order.
- Note:* it can take a few hours for the changes to be live on your site.

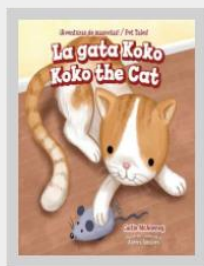


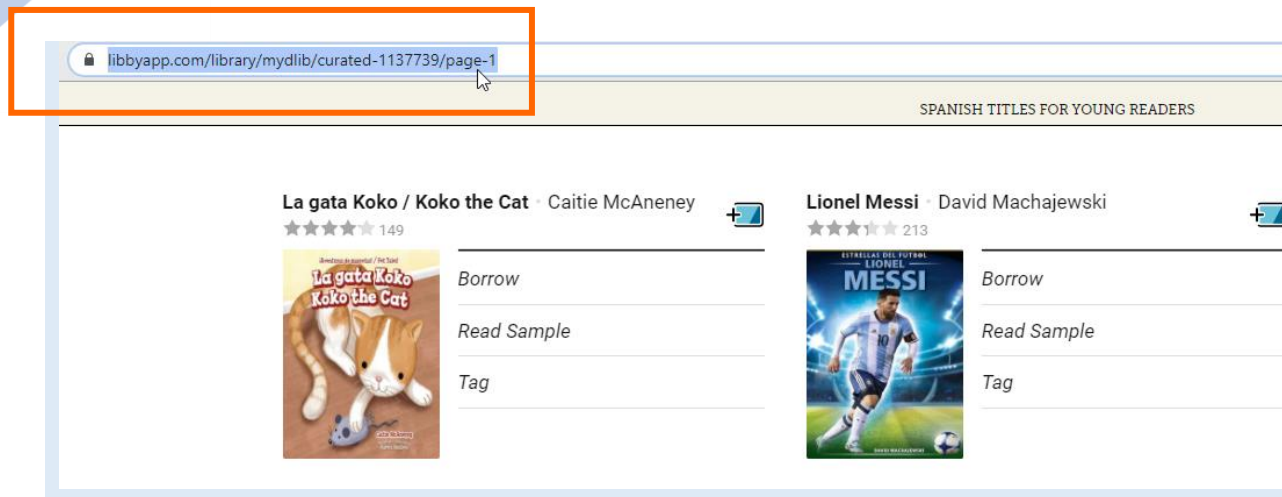
*Link to specific collections:*

When a collection is created, it is assigned a specific URL. You can copy that URL and share with patrons to promote collections. To find that link:

- Visit** your OverDrive homepage
- Sign in** with a library card.
- Click on the **title** of the curated collection
- Copy the **hyperlink** in the address bar.
- Share** that link and patrons will be directed to your collection!

Spanish Titles for Young Readers 

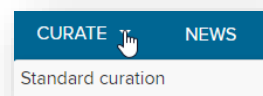




## Curate collections: Automated curation

Automated lists update every 24 hours and are great for broad category collections. Examples include: *Newly Added, Most Popular, Mysteries, Romance, Children's, Teens, Audiobooks*, etc.

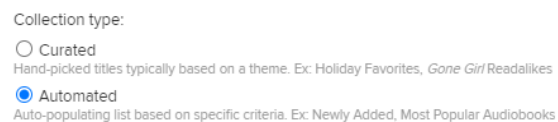
1. Select **Standard curation** from the Curate drop-down menu.



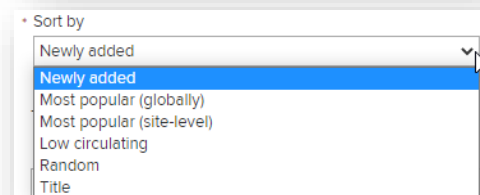
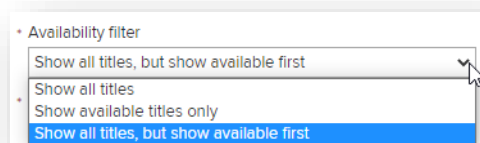
2. Click **Create standard collection**.

CREATE STANDARD COLLECTION

3. In the pop-up window that opens, choose **Automated** as your collection type, enter a collection **title**, an optional **description** for your collection, and click **Next**.



4. When you click Next, you'll be taken to your collection's details page. Here you can:
  - a. Edit your collection name and collection description.
  - b. Choose an availability filter to determine how titles will display based on availability.
  - c. Choose how the collection will be sorted.
  - d. Choose publishing locations to determine where the collections will appear on your OverDrive website and in Libby.
  - e. Further limit your collection by:
    - audience
    - BISAC subject(s)



- format
- language
- publisher

5. When you're ready to publish your collection, click Publish from the collection details page.

PUBLISH

6. In the pop-up window that opens, click Publish again.

## Curate Made Easy: Curation hack

### TIP:

Our OverDrive team of Staff Librarians regularly creates and updates a plethora of title recommendation lists to high-light award winners, current events, bestsellers, pop culture, and much more! These lists are found on the [Collection Development Page on the OverDrive Resource Center](#).

Each link opens in Marketplace and **can be turned into a curated collection** on your page with a few simple clicks. See below for details.

1. To use OverDrive-created lists, visit the [Collection Development Page on the OverDrive Resource Center](#).
2. To change the list from the shopping view to the curate view, highlight **OneCopyOneUserAndMeteredAccess** on the page URL and delete it.
3. Replace it with the word **Curate** and hit enter on your keyboard. Now, you'll see titles from the list that you *own in your collection*.

The screenshot illustrates the 'Curation hack' process in two stages. In the top stage, the browser's address bar shows the URL: `https://marketplace.overdrive.com/Shop/OneCopyOneUserAndMeteredAccess/Search?q=%7B%22SuggestedListId%3A18565%2C%22SearchKey%3A%22%7D`. The 'OneCopyOneUserAndMeteredAccess' portion of the URL is highlighted with an orange box. Below the address bar, the page title is 'A Family Affair: Bridgerton Read Alikes' with a sub-header '289 titles' also highlighted in blue. In the bottom stage, the address bar URL has been changed to: `https://marketplace.overdrive.com/Shop/Curate/Search?q=%7B%22SuggestedListId%3A18565%2C%22SearchKey%3A%22%7D`. The 'Curate' portion of the URL is highlighted with an orange box. The page title remains 'A Family Affair: Bridgerton Read Alikes', but the sub-header now shows '78 titles', indicating that only titles owned by the user are displayed. An orange arrow points from the 'Curate' part of the second URL back to the 'OneCopyOneUserAndMeteredAccess' part of the first URL.

4. Select the titles you want to add and click “Create Collection.”

+ Create collection

5. Choose availability filter and publishing location.

6. Click “publish” and your collection will be live on your site within 2-6 hours!

## Curate titles you recently purchased for your Advantage account using these steps:

### Search and curate by Purchase Order

1. View your Advantage purchases by clicking on **Insights > Purchase orders** and then clicking **Run new report**.
2. Using the criteria pictured here, enter your preferred start / end dates and Advantage billing account to find purchases you’ve made within a desired time period.
3. **Highlight and copy** the purchase order ID (the numbers after the # in the Order ID column of the report results).
4. Under the curate tab, click **Standard curation** and open an **Advanced search**.
5. **Paste** your copied PO into the Purchase Order ID Field.
6. **Run** the search.
7. **Add** desired titles to a collection.
8. **Publish** your collection.

Order ID
digitallibrary-20200413-135556-105258, #1766073
digitallibrary-20200417-114843-4349, #1765476
digitallibrary-20200310-095127-4349, #1765503

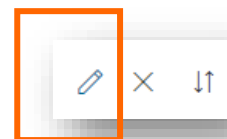
Purchase Order ID
1766073

## “Refresh” collections so the newest consortium-curated collections show to your patrons using these steps:

1. If you change the **Customize Advantage collections** setting back to **No**, you'll lose any collections that you customized for that section of your Advantage site and your collections will match the consortium's again.
2. To prevent this, click **Curate > Organize published collections**.

3. Start with *standard (manual) curated lists*.

For each list you want to keep, click the **pencil icon** beside the title.



4. When the collection opens, click **Create Draft**.

CREATE DRAFT

5. Click **Save Draft**.

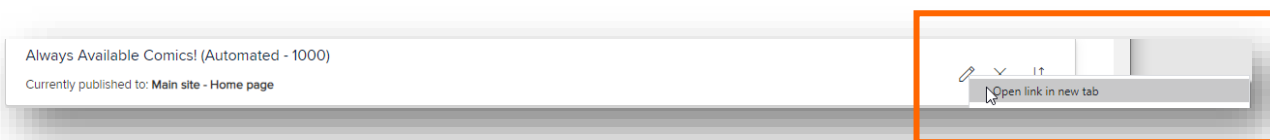
SAVE DRAFT

6. To make sure the collection is saved, check **Standard curation > Draft Standard Collections**. You should see the collection there.

	Pinned	Title	Description
<input type="checkbox"/>	1	<a href="#">Shelf Awareness Featured Titles</a>	

7. Next, for any *automated collections*

you've created, **right click** the pencil icon and open the collections each in a new tab. Leave the



tabs open for now.

8. With all manual collections saved as drafts and all automated collections open in new tabs, it's now safe to **toggle the blue switch over to No** under the *Customize Advantage Collections* page. This will allow the consortium-created collections to refresh.

9. **Toggle the blue switch back to Yes** to turn Advantage curation back on.

YES NO

10. Now, **click on each tab** to open your automated collection(s) and click **Publish**.

PUBLISH

11. In Standard Collections > Draft Standard Collections, click to open each collection and click **Publish**.

YES NO

saved

12. Click **Organize Published Collections** to drag and drop rearrange collections to your specifications.

