

Holdings Manager

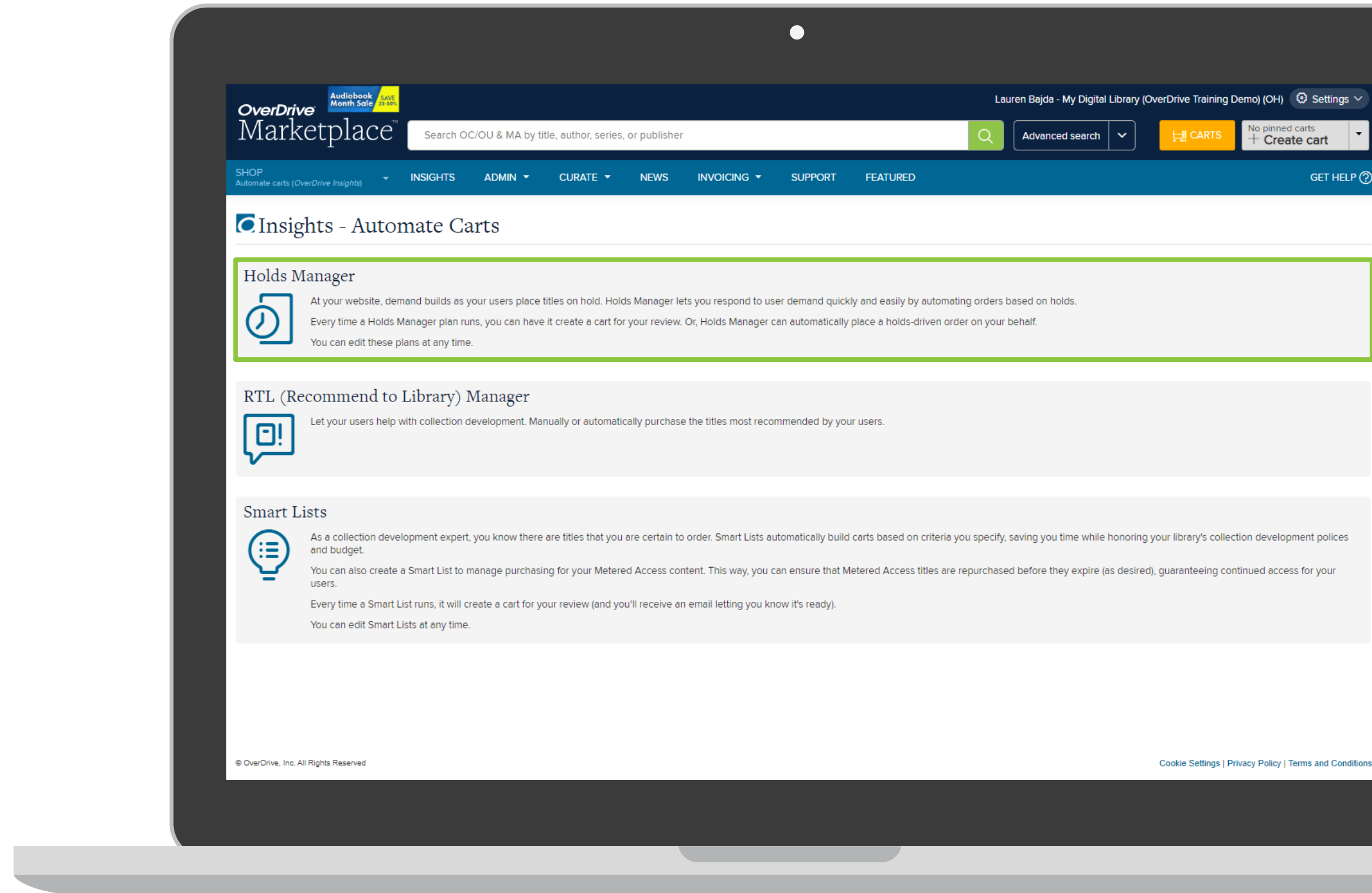
How to create a Holdings Manager plan in OverDrive Marketplace

OverDrive[®]

Hold manager

Respond to demand for titles quickly and easily by *building or automating* orders based on **holds**.

Best practice is for libraries to set up a holds manager plan.



Holds manager

Benefits:

- ✓ Saves you time
- ✓ Keeps you on budget
- ✓ Gets new additions to your digital collection faster

OverDrive Marketplace

Search OC/OU & MA by title, author, series, or publisher

Lauren Bajda - My Digital Library (OverDrive Training Demo) (OH) Settings

SHOP Automate carts (OverDrive Insights) INSIGHTS ADMIN CURATE NEWS INVOICING SUPPORT FEATURED GET HELP

Holds Manager

At your website, demand builds as your users place titles on hold. Holds Manager lets you respond to user demand quickly and easily by automating orders based on holds. Every time a 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. You can edit these plans at any time.

+ CREATE NEW ⇌ RUN NOW ✎ EDIT 📄 CREATE WORKSHEET ✖ DELETE

#	Format(s)	Internal purchase order ID	Frequency	Budget remaining	Last run date	Next run date	Last edited by
1.			Daily	\$100.00	6/22/2020	6/23/2020	Heather Valentine-Gold
2.			Once a month	n/a	5/28/2020	6/28/2020	Heather Valentine-Gold
3.			Once a week	\$500.00	6/17/2020	6/24/2020	Liz Isbell
4.			Once a week	\$100.00	6/17/2020	6/24/2020	Heather Valentine-Gold
5.			Once a month	n/a	6/3/2020	7/3/2020	Heather Valentine-Gold
6.			Once a week	n/a	6/22/2020	6/29/2020	Heather Valentine-Gold
7.			Once a week	\$2,000.00	6/22/2020	6/29/2020	Lauren Bajda

+ CREATE NEW ⇌ RUN NOW ✎ EDIT 📄 CREATE WORKSHEET ✖ DELETE

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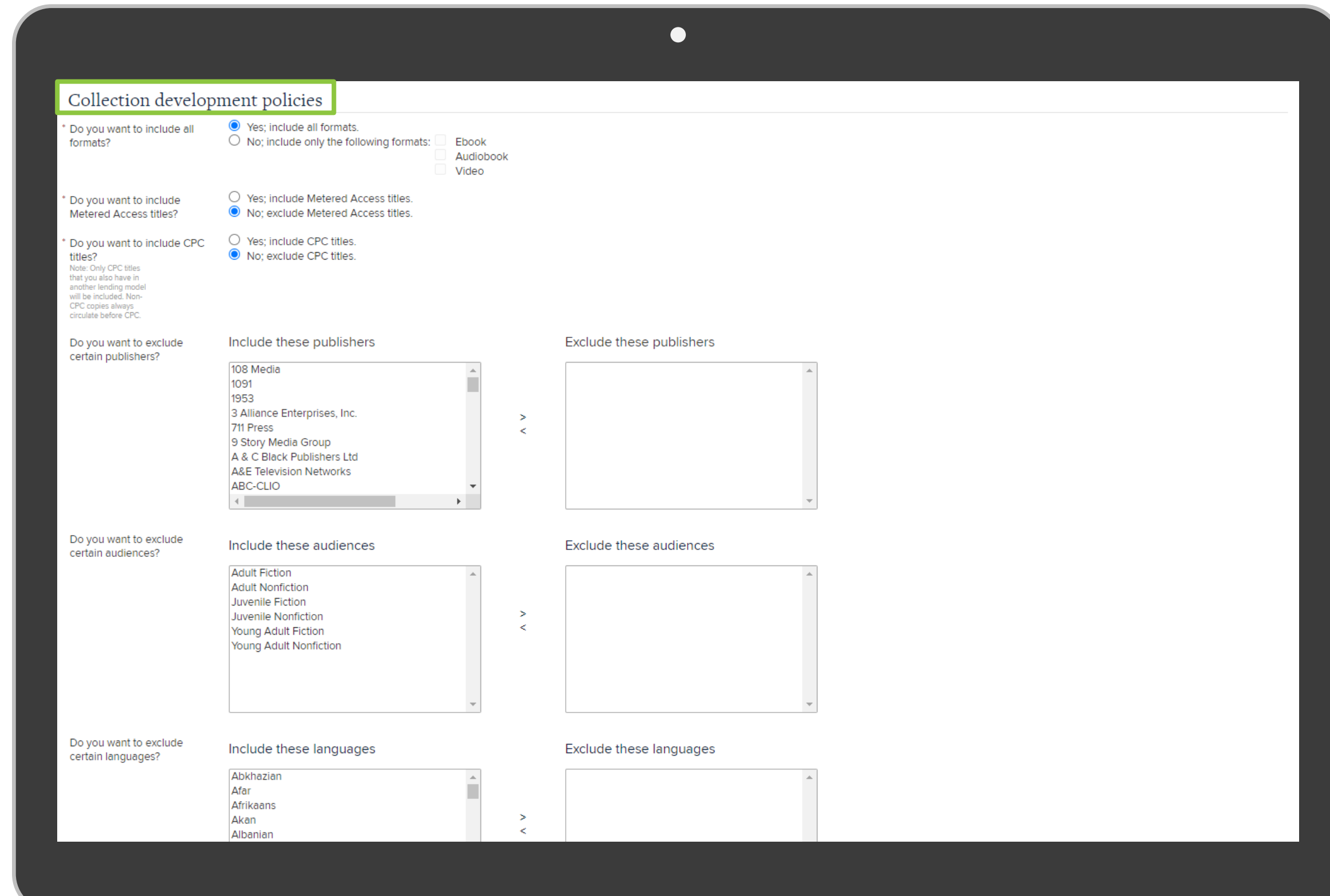
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Recap

The screenshot shows the 'Holds Manager' interface with a navigation bar at the top containing 'SHOP Automate carts (OverDrive Insights)', 'INSIGHTS', 'ADMIN', 'CURATE', 'NEWS', 'INVOICING', 'SUPPORT', 'FEATURED', and 'GET HELP'. The main heading is 'Holds Manager'. Below it, a note states 'Fields marked by * are required.' The section 'User demand and budget' is highlighted with a green box. It contains several configuration questions:

- Do you want to fill holds based on the number of holds or by holds ratio?**
Holds ratio = holds/number of copies owned.
 By holds ratio. If the holds ratio for a title is or higher, then order additional copies.
 By holds. Order copies as necessary so that holds on a given title do not exceed .
- Do you want to exclude suspended holds?**
 Yes; exclude suspended holds
 No; include all holds
- Do you want to exclude delivered holds?**
A delivered hold is available for a user to borrow, but hasn't been retrieved yet.
 Yes; exclude delivered holds
 No; include all holds
- Do you want to exclude Lucky Day copies from the holds ratio?**
 Yes; exclude copies designated for Lucky Day
 No; include all copies in my collection
- Do you want to limit how much you spend each calendar month?**
Enter a whole value (ex: 20 not 19.99).
 No limit; order as many copies as necessary.
 Yes; I don't want to spend more than USD per month. Once this limit is reached, pause this plan for the remainder of the budget duration.
- Do you want to limit how much you spend per cart? A cart is created each time this plan runs.**
Enter a whole value (ex: 20 not 19.99).
 No limit (besides your monthly spending limit, if one exists)
 Yes; I don't want to spend more than USD per cart.
- Do you want to limit the copies purchased for a given title?**
 Yes; I don't want to own more than copies of any title.
 No; include as many copies as needed to satisfy this plan.
- Do you want exclude titles based on price?**
Enter a whole value (ex: 20, not 19.99)
 No; include all titles.
 Yes; exclude titles priced more than USD.
- Do you want exclude titles that are currently pending in other carts?**
 No; include all titles.
 Yes; exclude titles that are currently pending in other carts.

Recap



Recap

The screenshot shows a web form for scheduling a Hold Manager plan. At the top, there are two lists of languages: 'Albanian, Amharic, Arabic, Aragonese, Armenian' and 'Blue Sky Campus, Instant Digital Card Users'. Below these are sections for 'Include these branches' and 'Exclude these branches'. A question asks 'Do you want to include preorder titles?' with 'No' selected. The 'Scheduling' section is highlighted with a green box and contains: 'How often do you want this plan to run?' (Once a week), 'When next do you want this Hold Manager plan to run?' (6/29/2020), a field for 'Internal purchase order ID', and a question about saving a cart or placing an order (Save a cart is selected). At the bottom are 'CONTINUE', 'RESET', and 'CANCEL' buttons.

Hold Manager

Cart Type: Hold Manager (HSOP)

7 standard units
\$197.46

Last edited on 6/3/2020
by Heather Valentine-Gold

PURCHASE

THANK YOU

OverDrive[®]