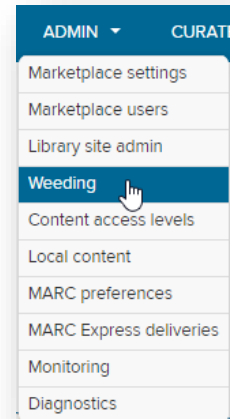


OverDrive[®] AUTOMATIC WEEDING PLAN

Setting up a plan:

1. In Marketplace, click on the **Admin** tab > **Weeding**.
2. On the Weeding page, click **CREATE PLAN**.
3. Enter your **weeding parameters**.

Recommended plan criteria below;
this plan will run daily and weed all expired metered access (MA)
content, but not items with holds.



Automatic weeding plan

Titles must meet all of your specified criteria to be weeded. For example, if you set your plan to weed expired titles and titles without active holds, titles must *both* be expired and have no active holds to be automatically weeded.

Notes:

- Your plan will run daily and hide eligible titles within 24 hours.
- If you want to restore a weeded title to your collection, click [Search collection](#) to find and unweed it. Please note your plan will automatically weed your restored titles again if they meet the plan's criteria.
- Weeded titles may have outstanding holds. Use the [Manage holds](#) tool to cancel holds on weeded titles (End-user support permission is required). If you cancel holds, end users will not be automatically notified.

Holdings

- * Do you want to weed all expired Metered Access titles?
- Yes; weed all expired Metered Access titles
 No; weed only these kinds of expired Metered Access titles:

Collection development policies

- Only weed titles that are no longer available for purchase in Marketplace.

User demand

- Only weed titles with 0 active holds.

[SAVE](#) [RESET](#) [CANCEL](#)

Expired titles with holds:

We recommend excluding items with holds from an automatic weeding plan for two reasons:

1. If an item is **expired and still has holds**, repurchasing should be considered instead of weeding.
2. If you're weeding a title that has holds, **the holds should be cancelled** after weeding or the holds will remain, driving up your average wait time and leaving patrons on hold indefinitely.

For this reason, in addition to the automatic weeding plan, we recommend setting up **Smart Lists** to catch these expired and on holds titles. See the next page for instructions on setting these up.

OverDrive® SMART LISTS

Setting up Smart Lists:

Smart Lists



To catch expired titles with holds, two Smart Lists are needed:

One to catch titles expired by time and one to catch titles expired by checkouts.

You will repeat the process twice, noting the differences **highlighted** below.

Smart List for expired and on hold titles:

1. In Marketplace, click on the **SHOP** tab > **Automate Carts**.
2. On the Automate Carts page, choose **Smart Lists**.
3. Enter your **User demand and budget** criteria.

Recommended plan criteria below; feel free to adjust criteria to fit your needs.

User demand and budget

* Do you want to limit the number of titles to include on this Smart List?

Yes; limit this Smart List to titles.

No limit; include all titles that match this Smart List's criteria.

* Do you want to limit how much you spend per cart? A cart is created each time this Smart List runs.
Enter a whole value (ex: 20 not 19.99).

No limit; include all titles that match this Smart List's criteria.

Yes; I don't want to spend more than USD per cart.

* How many copies of each title should be added?

copies.

* Do you want to limit the total number of copies of a given title in your collection?

Yes; I don't want to own more than copies of any title.

No; always add as many copies as I specified above.

* Do you want to 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.

* This Smart List could create a large cart. How would you like the titles sorted? Ord

In this section, you can customize:

- maximum number of copies you want to own per title
- whether to exclude titles based on price
- how your cart is sorted

Smart List specifics:

Recommended plan criteria below; feel free to adjust criteria to fit your needs.

Smart List specifics

Metered Access management

Do you want to include Metered Access titles? Yes; include Metered Access titles.
 No; exclude Metered Access titles.

Do you want to *only* include Metered Access titles? No; include titles in all lending models.
 Yes; include only titles in the following Metered Access lending models:

MA: by time
 For example, some publishers allow 12 months of circulation per copy.
 - Include titles when the final copy in my collection is days or less from expiration.
 - Only include titles with or more total checkouts.
 - Only include titles with or more active holds.

MA: by checkout
 For example, some publishers allow 26 checkouts per copy.
 - Include titles when checkouts or less remain in my collection.
 - Only include titles with or more total checkouts.
 - Only include titles with or more active holds.

* If a title is available in multiple lending models: Add the title to a cart for review.
 Your plan will add the title to a cart for you to review and select the lending model you prefer.
 Add the title in the OC/OU model.
 When available, your plan will add the title in the OC/OU model to your cart.
 Add the title in the MA model.
 When available, your plan will add the title in the MA model to your cart.

* If a title is available in multiple Metered Access lending models: Add the title to a cart for review.
 Add the title under the model with the most amount of time or checkouts.
 Add the title under the model with the least amount of time or checkouts.

For Smart List #1 Expired, On Hold MA by Time, use this criteria

For Smart List #2 Expired, On Hold MA by Checkouts, use this criteria

In this section, you can customize:

- how many holds a title must have before it's added to a cart
- how to handle titles available in multiple lending models
- how to handle titles available in multiple metered access lending models

General policies:

Recommended plan criteria below; feel free to adjust criteria to fit your needs.

General policies

Do you want to include all formats? Yes; include all formats.
 No; include only the following formats: Audiobooks
 Ebooks
 Video

Do you want to include titles based on their on sale date? No; include all titles.
 Yes; include only titles for sale in the

Do you want to add titles based on their street date? No; include all titles.
 Yes; include only titles with streetdates from:

Do you want to include preorder titles? Yes
 No

Advanced filters:

Advanced filters

Audience	Include all Adult Fiction	Include only <input type="text"/>
Suggested filters	Include all 0 copies available & 0 holds	Include only <input type="text"/>
Subjects	Include all Aboriginal Law	Include only <input type="text"/>
Popular authors	Include all Abbott, Jeff	Include only <input type="text"/>
Popular series	Include all Adult Fiction / A Song of Ice and Fire	Include only <input type="text"/>
Reviewed by	Include all Associated Press	Include only <input type="text"/>
Imprints	Include all #Tudatoság.Könyvek Kiadó	Include only <input type="text"/>
Languages	Include all	Include only <input type="text"/>

In these sections, you can customize:

- numerous filters including format, street date, audience, publisher, author, series, language, and more.

Scheduling:


Recommended plan criteria below; feel free to adjust criteria to fit your needs.

For Smart List #1 Expired,
On Hold MA by Time, use
this criteria

Scheduling

* Plan status Active
 Inactive

* Name this Smart List.

* On what date do you want this Smart List to run for the first time? 
Select a future date (tomorrow or later).

* After this Smart List runs for the first time, how often do you want it to run going forward?
 Weekly Every Days

Name the cart that will be created by this Smart List.


If desired, please enter an internal purchase order ID.

For Smart List #2 Expired,
On Hold MA by Checkouts,
use this criteria

Scheduling

* Plan status Active
 Inactive

* Name this Smart List.

* On what date do you want this Smart List to run for the first time? 
Select a future date (tomorrow or later).

* After this Smart List runs for the first time, how often do you want it to run going forward?
 Weekly Every Days

Name the cart that will be created by this Smart List.

If desired, please enter an internal purchase order ID.

In this section, you can:

- Pause your plan (set to inactive)
- Name your Smart List
- Choose the frequency of your cart creation
- Name your Cart
- Add a P.O.