

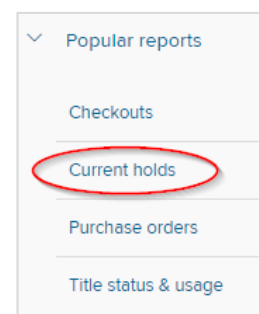
OverDrive PURCHASING FOR HOLDS (SHARED & ADVANTAGE)

Use the Current Holds report to determine titles that warrant purchasing additional copies to meet patrons' needs.

RUNNING THE HOLDS REPORT

Getting started:

1. Log into Marketplace and click the **INSIGHTS** tab on the blue bar across the top of your screen.
2. Click **Current holds** (under Popular Reports on the left-hand side of the screen).
3. Click the **Run new report** button.
4. Set your report **options**:
 - *Run by*: Title
 - *Branch*: Select your individual branch if you're an **Advantage library** or if you are purchasing based on your branch. Otherwise, leave blank
 - *Availability*: Available for sale
5. Click Update.



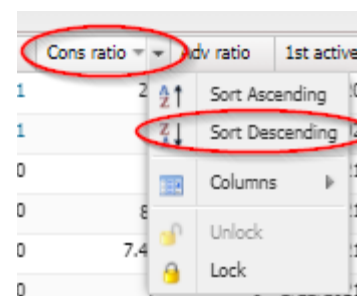
 A screenshot of a dialog box titled 'Current holds report options'. It contains several dropdown menus: 'Run by:' (set to 'Title'), 'Branch:' (set to 'Kingsville Public Library'), 'Weed status:' (set to 'All'), 'Hold status:' (set to 'All'), 'Availability:' (set to 'Available for sale'), and 'Website:' (set to 'Standard and mobile'). At the bottom, there is a 'CREATE WORKSHEET' button, an 'Update' button (circled in red), and a 'Cancel' button.

Viewing search results:

1. Locate the **Cons ratio*** column and hover your mouse over the column header; an arrow will appear to the right of the header name.

**"Cons" stands for "consortium," and refers to your shared library collection.*

Note: When you run a holds report by branch, the "total holds" column will always match the "ADV holds" column. There are most likely **more total holds on the title** than appears in these report results.



2. Click the arrow in the Cons ratio header and choose **Sort descending**.
This option reorganizes results so the books with the **most holds per copy owned** are listed first.

TIP:

Ideally the ratio of **holds to copies owned** is *no more than 5-10*.

We will create a cart of titles with a ratio of 3 or more. Note how many titles in the report have a Cons ratio of 3 or higher.

There are 10 in the following example:

	Title	Creator	Format	All holds	Adv holds	Cons ratio	Adv ratio	1st active hold
1	My Hero Academia, Volume 2	Kohei Horikoshi	📖	1	1	37 ⁺	1	6/18/2021
2	My Hero Academia, Volume 1	Kohei Horikoshi	📖	1	1	32.33 ⁺	0.33	6/18/2021
3	Shadow and Bone: The Grisha Trilogy, Book 1	Leigh Bardugo	📖	1	1	27	1	6/17/2021
4	Bone Crier's Moon	Kathryn Purdie	📖	2	2	10 ⁺	2	5/8/2021
5	Midnight Sun	Stephanie Meyer	📖	1	1	10	0.5	6/27/2021
6	Crave: Crave Series, Book 1 (unabridged)	Tracy Wolff, He...	📖	1	1	8	1	6/15/2021
7	The Goose Girl: Bayern Series, Book 1 (unabridged)	Shannon Hale, ...	📖	1	1	5	1	5/24/2021
8	Avatar: The Last Airbender - The Lost Adventures	Various, Various	📖	1	1	4	1	6/20/2021
9	The Battle for Skandia: Ranger's Apprentice Series, Book 4 (unabri...	John Flanagan, ...	📖	1	1	4	1	7/1/2021
10	The Fellowship of the Ring: The Lord of the Rings Series, Book 1 (a...	J.R.R. Tolkien, ...	📖	2	2	4	2	6/19/2021
11	The Betrothed	Kiera Cass, Jasi...	📖	1	1	2	1	6/15/2021
12	Bone Crier's Moon: Bone Grace Series, Book 1 (unabridged)	Kathryn Purdie, ...	📖	1	1	2	1	6/15/2021
13	Crooked Kingdom: Six of Crows Series, Book 2	Leigh Bardugo	📖	1	1	2	1	7/3/2021
14	Fall of Hades: Michael Vey Series, Book 6	Richard Paul Ev...	📖	1	1	2	1	6/30/2021
15	The Nightingale: A Novel (unabridged)	Kristin Hannah, ...	📖	1	1	2	1	6/4/2021
16	A Court of Thorns and Roses: A Court of Thorns and Roses Series, ...	Sarah J. Maas	📖	1	1	1.5	0.5	7/7/2021
17	The One: The Selection Series, Book 3	Kiera Cass	📖	1	1	1.5 ⁺	0.5 ⁺	7/7/2021
18	The Burning Bridge: Ranger's Apprentice Series, Book 2 (unabridged)	John Flanagan, ...	📖	1	1	1	1	7/2/2021

Creating a cart from the Current holds report:

1. From the Current holds search results, click **Convert to new cart**.
2. In the pop-up window:
 - **Name** your cart.
 - Add a **description** (*optional*).
 - Add the **number of titles** with a Cons ratio of 3 or more.
 - Select Cons ratio for the **Include titles based on** field.
 - Ensure **Pin as main cart** is checked.
 - Click **CREATE** to generate holds cart.

- Click the orange **CARTS** button in the upper right-hand corner of Marketplace.



Locating and reviewing your holds cart:

- On the **CARTS** page, locate the holds cart you created.
- Open the **holds cart**.
There will be one copy of each title from your holds report with a Cons ratio of three or more.
- Review the titles in the hold cart.

TIP:

Pay close attention to the **Adv active holds** column.

This is the **total number of current active holds** from users at your library.

If you see a **high number of holds** from your users, you may want to increase the number of copies you're purchasing.

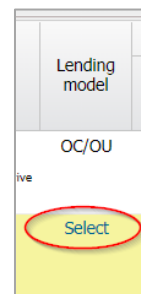
In the example below, there are **not** more than **2 Adv active holds** for any title, so we'll only purchase 1 copy of each book for now.

Page 1 of 1 50															Displaying 1 - 10 of 10				
Title	Creator(s)	Language	Format	Lending model	Cons MA	Adv MA	Cons OC/OU	Adv OC/OU	Total checkouts	Adv checkouts	Cons active holds	Adv active holds	Ad...	Unit price	Total				
1 Avatar: The Last Airbender - The Last Adventures	Various, Various	English	Kindle Book, OverDrive Read	OC/OU	0	0	1	0	29	0	4	1	1.00	\$14.99	\$14.99				
2 The Battle for Skandia: Ranger's Apprentice Series, Book 4 (unabridged)	John Flanagan, John Keating	English	OverDrive MP3, OverDrive Listen	Select	0	0	1	0	12	0	5	1	1.00	TBD	TBD				
3 The Betrothed	Kiera Cass, Jasika Nicole	English	OverDrive MP3, OverDrive Listen	OC/OU	0	0	1	0	12	1	4	1	1.00	\$59.98	\$59.98				
4 Bone Crier's Moon	Kathryn Purdie	English	Kindle Book, OverDrive Read, Audible EPUB	MA: 26 checkouts (one user)	1	0	0	0	9	0	13	2	2.00	\$10.99	\$10.99				
5 Bone Crier's Moon: Bone Grace Series, Book 1 (unabridged)	Kathryn Purdie, Fiona Hardingham, Alex Wyndham, Billie Rufford-Brown	English	OverDrive MP3, OverDrive Listen	OC/OU	0	0	1	0	3	0	2	1	1.00	\$67.48	\$67.48				
6 The Burning Bridge: Ranger's Apprentice Series, Book 2 (unabridged)	John Flanagan, John Keating	English	OverDrive MP3, OverDrive Listen	Select	0	0	1	0	88	2	1	1	1.00	TBD	TBD				
7 Crave: Crave Series, Book 1 (unabridged)	Tracy Wolff, Heather Costa, Tim Paige	English	OverDrive MP3, OverDrive Listen	Select	0	0	1	0	11	1	10	1	1.00	TBD	TBD				
8 Crooked Kingdom: Six of Crows Series, Book 2	Leigh Bardugo	English	Kindle Book, OverDrive Read, Audible EPUB	MA: 12 months (one user)	1	0	0	0	26	2	2	1	1.00	\$15.00	\$15.00				
9 Fall of Hades: Michael Vey Series, Book 6	Richard Paul Evans	English	Kindle Book, OverDrive Read, Audible EPUB	Select	0	0	0	0	243	3	2	1	1.00	TBD	TBD				
10 The Fellowship of the Ring: The Lord of the Rings Series, Book 1 (abridged, dramatized performance)	J.R.R. Tolkien, Ensemble cast	English	OverDrive MP3, OverDrive Listen	Select	0	0	1	0	105	4	4	2	2.00	TBD	TBD				
Page 1 of 1 50															Displaying 1 - 10 of 10				

Selecting a lending model (where needed):

If any titles are highlighted in yellow (see above screenshot for an example), you'll need to choose a lending model for that title before purchasing.

1. Locate the **Lending model** column.
2. Click **Select** where it appears in that column for each highlighted title.
3. Select the **desired lending model** for that title in the pop-up window.
4. Click **APPLY** to confirm the chosen lending model.



 A screenshot of a 'Select lending model' pop-up window. The window has a title 'Select lending model' and a subtitle 'Some titles are available in more than one lending model, choose a lending model for each title below.' There are two main sections. The first section is titled 'OC/OU & MA: 12 months (one user)'. It contains a table with columns 'Title', 'OC/OU', and 'MA: 12 months (one user)'. The titles are 'The Battle for Skandia' and 'The Burning Bridge'. The 'OC/OU' column has radio buttons and prices (\$63.00). The 'MA: 12 months (one user)' column has radio buttons and prices (\$31.50). The second section is titled 'OC/OU & MA: 100 checkouts (concurrent users)'. It contains a table with columns 'Title', 'OC/OU', and 'MA: 100 checkouts (concurrent users)'. The titles are 'Crave' and 'The Fellowship of the Ring'. The 'OC/OU' column has radio buttons and prices (\$59.95, \$33.00). The 'MA: 100 checkouts (concurrent users)' column has radio buttons and prices (\$95.92, \$52.80). At the bottom, there are buttons for 'APPLY', 'DO THIS LATER', and 'RESET'. A red circle highlights the 'APPLY' button.

Purchasing your cart:

1. Click the green **PURCHASE CART** button (or click **CREATE QUOTE** to generate a quote if needed to secure a Purchase Order).



2. Complete your purchase by agreeing to the **special conditions** and selecting your **payment method**.

PURCHASING HOLDS ADDITIONAL TRAINING (*OPTIONAL*)

Looking for more in-depth training on getting your holds current or managing holds in Marketplace?

- [Managing Holds in Marketplace](#) (video)
- [What is the holds ratio and where can I find it?](#) (Marketplace Help article)
- [How to purchase a cart](#) (Marketplace Help article)
- [How to create a quote](#) (Marketplace Help article)

Don't have time to run these reports?

Contact your **OverDrive Account Team** for help setting up a Holds Manager Plan or follow the instructions below to set up a Hold Manager Plan on your own!

[Automating Carts: Create a Holds Manager Plan](#) (video)