

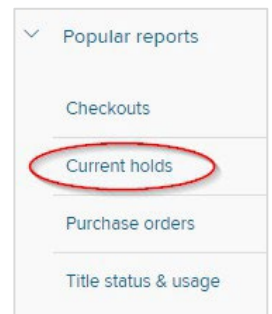
OverDrive PURCHASING FOR HOLDS (SHARED & ADVANTAGE)

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 are three buttons: 'CREATE WORKSHEET', 'Update', and 'Cancel'. The 'Update' button is circled in red.

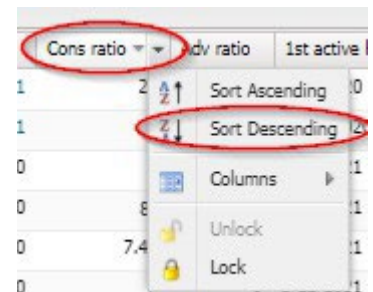
Viewing search results:

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 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	Stephenie Mey...	📖	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.

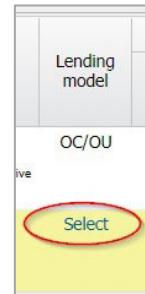
In the example below, there are **not** more than **2 Adv active holds** for any title, so we'll only purchase 1 copy of each book for now.

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Title	Creator(s)	Language	Format	Lending model	Own					Activity					Unit price	Total	
					Cons MA	Adv MA	Cons OC/OU	Adv OC/OU	Total check...	Adv checkouts	Cons active holds	Adv active holds	Ad...	Uni...			
1 Avatar: The Last Airbender - The Lost Adventures	Various, Various	English	Kindle Book, OverDrive Read	OC/OU	0	0	1	0	29	0	4	1	1.00	1	\$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	1	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	1	\$59.98	\$59.98	
4 Bone Crier's Moon	Kathryn Purdie	English	Kindle Book, OverDrive Read, Adobe EPUB	MA: 26 CHECKOUTS (one user)	1	0	0	0	9	0	13	2	2.00	1	\$10.99	\$10.99	
5 Bone Crier's Moon: Bone Grace Series, Book 1 (unabridged)	Kathryn Purdie, Fiona Hardingham, Alex Wyndham, Belle Hafford-Brown	English	OverDrive MP3, OverDrive Listen	OC/OU	0	0	1	0	3	0	2	1	1.00	1	\$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	1	TBD	TBD	
7 Crave: Crave Series, Book 1 (unabridged)	Tracy Wolff, Heather Costa, Tim Payne	English	OverDrive MP3, OverDrive Listen	Select	0	0	1	0	11	1	10	1	1.00	1	TBD	TBD	
8 Crooked Kingdom: Six of Crows Series, Book 2	Leigh Bardugo	English	Kindle Book, OverDrive Read, Adobe EPUB	MA: 12 MONTHS (one user)	1	0	0	0	26	2	2	1	1.00	1	\$15.00	\$15.00	
9 Fall of Hades: Michael Vey Series, Book 6	Richard Paul Evans	English	Kindle Book, OverDrive Read, Adobe EPUB	Select	0	0	0	0	243	3	2	1	1.00	1	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	1	TBD	TBD	

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 title is 'Select lending model'. Below the title, it says 'Some titles are available in more than one lending model, choose a lending model for each title below:'. There are two sections. The first section is titled 'OC/OU & MA: 12 months (one user)'. It has a table with columns for 'Title', 'OC/OU', and 'MA: 12 months (one user)'. The titles listed are 'The Battle for Skandia' and 'The Burning Bridge'. The 'OC/OU' column has a radio button selected and a price of '\$63.00'. The 'MA: 12 months (one user)' column has a radio button unselected and a price of '\$31.50'. The second section is titled 'OC/OU & MA: 100 checkouts (concurrent users)'. It has a table with columns for 'Title', 'OC/OU', and 'MA: 100 checkouts (concurrent users)'. The titles listed are 'Crave' and 'The Fellowship of the Ring'. The 'OC/OU' column has a radio button unselected and prices of '\$59.95' and '\$33.00'. The 'MA: 100 checkouts (concurrent users)' column has a radio button selected and prices of '\$95.92' and '\$52.80'. At the bottom left, there is a green 'APPLY' button and a grey 'DO THIS LATER' button. At the bottom right, there is a grey 'RESET' 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?

- [Holds and Metered Access Management](#) (how-to videos)
- [What is the holds ratio and where can I find it?](#) (Marketplace Help article)
- [How to purchase a cart](#) (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!

[Create Holds Manager plans \(how-to video\)](#)