



POLICIES AND PROCEDURES

OVERDRIVE/EINDIANA CONTACTS

OverDrive Project Manager: Nate Wheaton (nwheaton@overdrive.com / 216-873-6886 x 420)

ISL Project Manager: Anna Goben (agoben@library.in.gov / 317-234-6624)

eIndiana Library Liaison: Matthew Stevenson (mstevenson@plainfieldlibrary.net)

eIndiana Advisory Committee Chair: Montie Manning (mmanning@plainfieldlibrary.net)

OverDrive Support: <https://marketplace.overdrive.com/Support>

ADVANTAGE ACCOUNTS

The committee has voted to allow eIndiana Consortium members to have Advantage Accounts with the implementation of the AdvantagePlus program.

Materials purchased for eIndiana Advantage account libraries will be held for local use exclusively for the first 6 months of the license. At that point, materials will automatically roll into the shared collection for all member libraries patrons to access. The admin team at the State Library will request regular catch-up MARC updates so that (one-copy-one-user) Advantage purchases are added to the Evergreen Indiana catalog after they have been released to the community at large.

CREDIT BALANCES

Content credits paid annually to Overdrive must be spent within 14 months. Any funds that are left after 14 months (January 1st following the October renewal) will be combined and spent by a designated member of the eIndiana Overdrive Committee. These funds will be used to purchase titles with high numbers of holds and also to purchase titles that are requested by patrons.

CIRCULATION RULES

In order to use the eIndiana service a user must have a library card from a participating library, which is in good standing (less than \$10 in fines). They may also need a PIN for their library card (determined by each member library).

Only residents, PLAC patrons, students, or patrons who have purchased a non-resident card from a participating library may use the eIndiana service. Reciprocal borrowers and computer usage cards may not use the service at this time.

Each user may check out 10 titles at a time on their library card.

For ebooks and eaudiobooks, loan duration is 7, 14, or 21 days, selected by the user at the time of checkout. For evideo, the available loan durations are 3, 5, and 7 days. The item file will automatically expire at the end of their loan period. The item will be deactivated. The user should manually delete the item from their device.

Items may be renewed in the eIndiana site if there are no existing holds, and there is not a limit on how many times an item may be checked out by the same user. This includes items with Metered Access.

Each user may have 10 active holds on their card at a time.

Each user has 3 days to checkout their hold once it becomes available.

COLLECTION/MARKETPLACE RULES & GUIDELINES

There is not currently an eIndiana collection development policy but one might be written at a later date. We are currently using the “common sense” method of collection development.

STAFF ACCOUNTS

Please email Anna Goben with any new requests for a Marketplace account. Accounts can be set up for any of the following permission groups:

- End-User Support: has the ability to place support tickets with OverDrive to assist patrons
- Selector: End-user support plus the ability to create carts.
- Purchaser: End-user support plus the ability to create and purchase carts.
- Fiscal manager: Serves as primary contact for invoicing.

Important: If a staff member with a Marketplace account leaves your library please contact the OverDrive Liaison or ISL Project Manager to have them removed.

FORMATS

Audiobook titles can be purchased in MP3 and streaming formats. MP3 titles are larger files but are compatible with all computers and devices. Streaming formats require a constant internet connection.

eBook titles are available in multiple formats. When a title is purchased, the consortium acquires all available formats of that eBook (ePub, Kindle, PDF, READ).

eBook formats:

- ePub is the format used with the various Barnes & Noble Nooks; it is also used with iPads and mobile devices (once Adobe Digital Editions has been downloaded and authorized)
- Kindle format is used with all Kindles, as well as Kindle Apps
- PDF files are rarely used, but work best when simply using a computer- they are also not generally available in newer titles
- The Overdrive READ format allows you to read an eBook in the browser of your portable device without needing any extra software or Adobe IDs. For the Kindle Fire, you will also not be directed to finish the checkout through Amazon. Please note that the Overdrive Read format works on most Apple products (iPod, iPad, iPhone) and Android devices (Android phones, tablets, Kindle Fire etc), as well as portable devices based on Windows (Windows phones and tablets). It is not compatible with standard dedicated eReaders such as the basic Nook and basic Kindle models.

ORDERING

Once you begin browsing the OverDrive Marketplace there are a few different ways you can see if the consortium already owns a copy of the titles and if there is significant demand for additional copies.

When viewing an individual item or items in a list, the top line below the available format listing on the right side of the screen shows the number owned by the consortium, how many are currently circulating, how many outstanding holds exist, the holds-to-owned copies ratio (our goal is 5:1 or better), and the number of copies pending in a cart. The line immediately below that shows the same information for the libraries that have Advantage accounts. If the title is a metered access title, you can see how many licenses have been used, and how many remain by clicking on the "Own MA" link. Metered access titles may be licensed for 26 or 52 circulation or 12 or 24 months depending on the publishers' terms and must be repurchased for continued access after that point.

The consortium has chosen to allow both One Copy/One User and Metered Access titles to appear in searches by default. Selectors should be aware of this when choosing titles for their carts. Selectors may select the "Lending Model" delimiter in the search interface and click on the desired model if there is a local preference for licensing.

When any selector begins building a cart in the Marketplace system the cart needs to be named identifiably so if anyone has a question about the cart they know who to contact. The preferred method of naming the cart is library shortname, selector name, and the date (i.e. STLIB-JSmith-201501). Click on the gray "+Create cart" button or select "Add to a new cart" from any item record to create and name a cart.

If you notice that you have an extra empty cart in the Marketplace, please delete it. You can see all the carts by clicking on "View Carts". This should bring up a list of all the carts for the entire consortium. To delete your empty cart simply click the box next to the list ID then click the red "Delete Cart" button at

the top of the page. Delete only carts with your name attached to them. Only designated OverDrive committee members should delete outdated or inactive carts that belong to another selector.

Automatic carts are also created for titles with holds (called *Titles w/Holds* or *OD: Hold Ratio 5:1*), titles that patrons have asked us to purchase (*Patron Recommendations*), and also metered access titles that are approaching the end of their license (*OD Metered Alert*). Any selector can submit these carts for purchase and/or move titles from these carts into theirs at any time. If you order some of the titles from these carts please remove the titles you ordered. If you ordered the entire cart, please delete the cart. Reports are also available, which allow you to see the current waiting list of titles as well as the current recommendations.

Carts that have been locked against editing by other viewers are classified by OverDrive as “Private”. However, you should be aware that everyone can see your cart, they simply can’t edit it. Please remember to name locked carts according to the above suggestion, so questions may be addressed to the correct person and/or library.

If you build a cart, please submit that order within one month. If other members of the consortium see an item is currently pending in another cart, they might choose not to purchase that title, so please submit your orders in a timely manner. Making frequent, smaller orders is preferable for OverDrive. If a cart stays on the working list for more than one month it might be deleted by a designated OverDrive committee member.

To complete an order begin by clicking on the green “Checkout” button in the top right-hand corner of the Marketplace or click on the “Purchase” button in the “View Carts” interface and review the contents of your cart. Once you are happy with your selections, click on the green “Purchase Cart” button. If you do not see this tab that means your username does not have the authority (as deemed by your Director) to purchase items. The next page contains conditions that must be acknowledged to complete the purchase, including metered access terms, final acceptances, and acknowledgements. Please enter any local Purchase Order information in the box. You will only be charged for your order after you click the green “Complete purchase” button at the bottom of this page to finalize your order. Once you click submit you will see a verification page letting you know it has been submitted, and your cart will disappear.

REPORTS

There are various reports you can run from the “Reports” tab in the Marketplace. Listed below are some of the most commonly used reports. These reports can be run for a single library or for the entire consortium.

- Purchase Order History – will list purchase orders made by anyone in the consortium
- Circulation Activity – view checkouts by library, lending model, format, and dates
- New User Registrations – view by day, month, and/or branch
- Search checkouts – search for and view users’ checkouts by barcode, title, or checkout ID. You can also reactivate the download links from here
- Current Waiting List – will show all the titles that currently have holds. Can be sorted by any of the column headings.

ALWAYS AVAILABLE/PUBLIC DOMAN EBOOKS

The OverDrive website (<https://cidc.overdrive.com/>) includes a limited selection of Public Domain eBooks as a downloadable option for users. They are available in Open ePub format, and use the Adobe Digital Editions software.

SUPPORT/TROUBLESHOOTING

Overdrive offers a variety of support options, which can be found by clicking on SUPPORT at the top of the page when logged into Marketplace. There are links to MANAGE HOLDS, RETURN TITLES, and RESET DOWNLOADS. The support page is searchable and is the same information that is available on the patron side.

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