

## Real-Time Reports:

Chart a path to success.



We'll showcase reports which best track circulation, new patrons, site traffic, and popular titles. Your team can then evaluate how your Virtual Branch is doing and chart a path to future success.

**Contact: [training@overdrive.com](mailto:training@overdrive.com)**

# Agenda

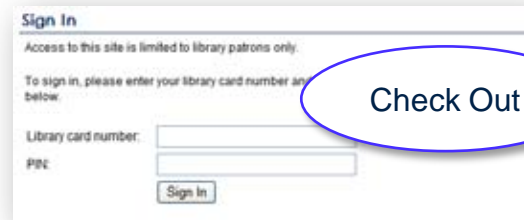
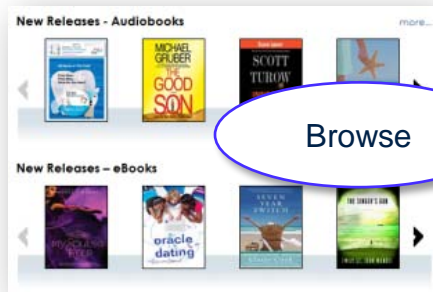
1. Getting started
2. Real-Time reports
3. For consortia: Advantage reports
4. Goal setting
5. OverDrive Dashboard™
6. Staff resources



The screenshot shows the OverDrive Content Reserve website interface. At the top, there is a navigation bar with links for Home, Marketplace, Collection, Reports (which is highlighted), Users, Approval Plan, Profile, News, Support, and Logout. Below the navigation bar, the page title is "View Reports". On the left side, there is a vertical sidebar with the word "Library" written vertically. The main content area lists several report options:

- Install OverDrive® Dashboard™ BETA**  
Install the Microsoft® Silverlight® tool which will allow you to monitor and evaluate real-time data from your OverDrive digital collection right from your desktop!
- View Purchase Order History**  
View all purchase orders placed by your library.
- View Maximum Access Orders**  
View all Maximum Access orders.
- View Download Standing Orders**  
View all download standing orders placed for your library.
- View Download Standing Order Estimates**  
View all download standing order plans, and associated titles, that are not yet processed.
- View Activity Charts**  
View all download and borrowing activity.
- View Gutenberg Activity Charts**  
View all download activity for Gutenberg titles.
- View Purchased Title Report**  
View all titles owned and subscription-based content. View checkout and hold counts for each title. Limit results by type and date purchased. (please be patient while this report loads).

# About your OverDrive service



## What's included?

- „ A customized 'Virtual Branch' website.
- „ A collection of digital titles selected by your library / consortium.

## How does it work?

- „ Browse, check out, and download using a library card ... anytime, anywhere!
- „ Download to a Windows® or Mac® computer ... and popular mobile devices.
- „ Transfer to devices like the Apple® iPod® and Sony® Reader™.
- „ Plus, eBooks for Kindle® ... now available! *For U.S. library partners*
- „ Accessibility features included for the visually impaired.

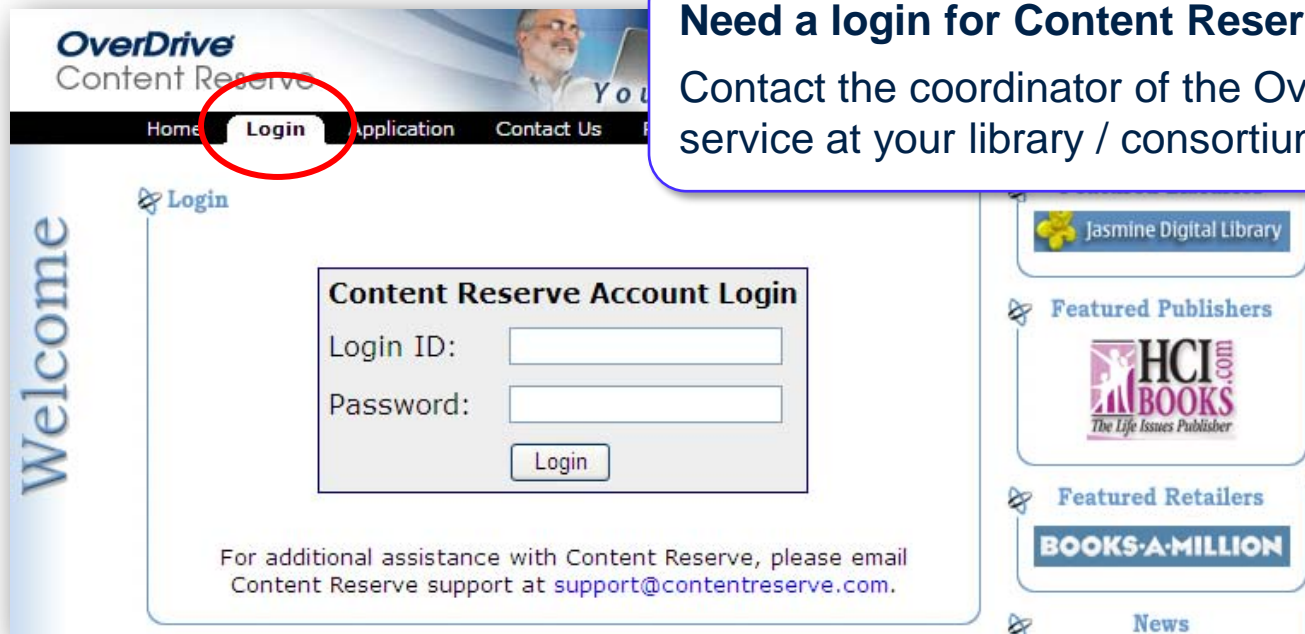
## What assistance is available?

- „ Expert training, collection assistance, and promotional assistance are included.
- „ Real-time reports track circulation online.
- „ OverDrive Support: [support@libraryreserve.com](mailto:support@libraryreserve.com).

# Getting Started

# Getting started

1. Go to Content Reserve™: [www.contentreserve.com](http://www.contentreserve.com).
2. Click on the 'Login' tab.
3. Enter your Content Reserve 'Login ID' and 'Password'.  
This is the same Login ID / Password used to order titles.



The screenshot shows the OverDrive Content Reserve website. The navigation bar includes 'Home', 'Login', 'Application', and 'Contact Us'. The 'Login' tab is highlighted with a red circle. Below the navigation bar, there is a 'Welcome' sidebar on the left and a main content area. The main content area features a 'Content Reserve Account Login' form with fields for 'Login ID:' and 'Password:', and a 'Login' button. To the right of the login form, there are sections for 'Featured Publishers' (including HCI.com) and 'Featured Retailers' (including BOOKS-A-MILLION). A blue callout box on the right side of the screenshot contains the text: 'Need a login for Content Reserve? Contact the coordinator of the OverDrive service at your library / consortium.'

# Tips and tricks

## Share or print a report:

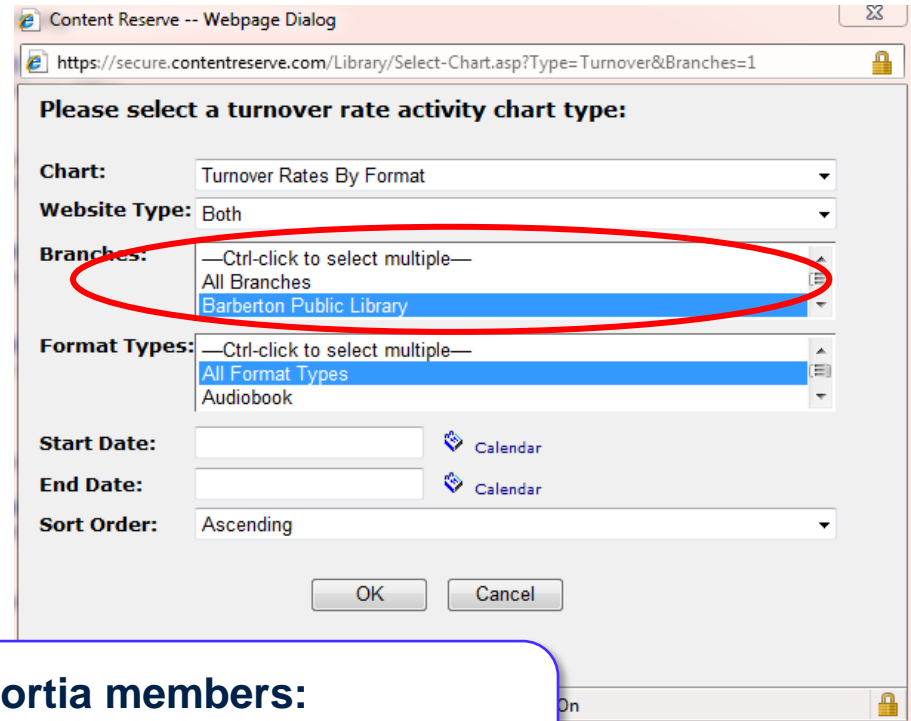
- „ Many results can be exported to Excel.
- „ Click 'Create Worksheet' from the results page.

## Select multiple items:

- „ Control-click to select multiple fields in a drop-down.

## Review schedule:

- „ Monthly and quarterly.  
*Monitor numbers and trends.*
- „ Annually.  
*Compare one year to the next.*
- „ Promotional campaigns.  
*Before, during, and after.*



Content Reserve -- Webpage Dialog

https://secure.contentreserve.com/Library/Select-Chart.asp?Type=Turnover&Branches=1

**Please select a turnover rate activity chart type:**

Chart: Turnover Rates By Format

Website Type: Both

Branches: —Ctrl-click to select multiple—  
All Branches  
Barberton Public Library

Format Types: —Ctrl-click to select multiple—  
All Format Types  
Audiobook

Start Date:  Calendar

End Date:  Calendar

Sort Order: Ascending

OK Cancel

## Consortia members:

Member libraries have the option to run reports by library.

# Evolution of a successful virtual branch

**Track  
Performance**

## **Library Goals**

### **Selectors**

Build a Strong Collection

### **Marketing**

Reach New Users

### **Administration**

Size-Up Success

**Your  
OverDrive  
Virtual  
Branch**



## **Sample Reports**

- „ Activity Charts
- „ Turnover Rate Charts
- „ New Patron Registration
- „ Current Waiting List
- „ Digital Library Statistics
- „ Traffic Reports

**Evaluate  
Goals**

# Introduction to Real-Time Reports

# Activity Chart

View checkout activity by day, month, publisher, format, title, subject, or branch for standard and mobile websites.

## Selectors:

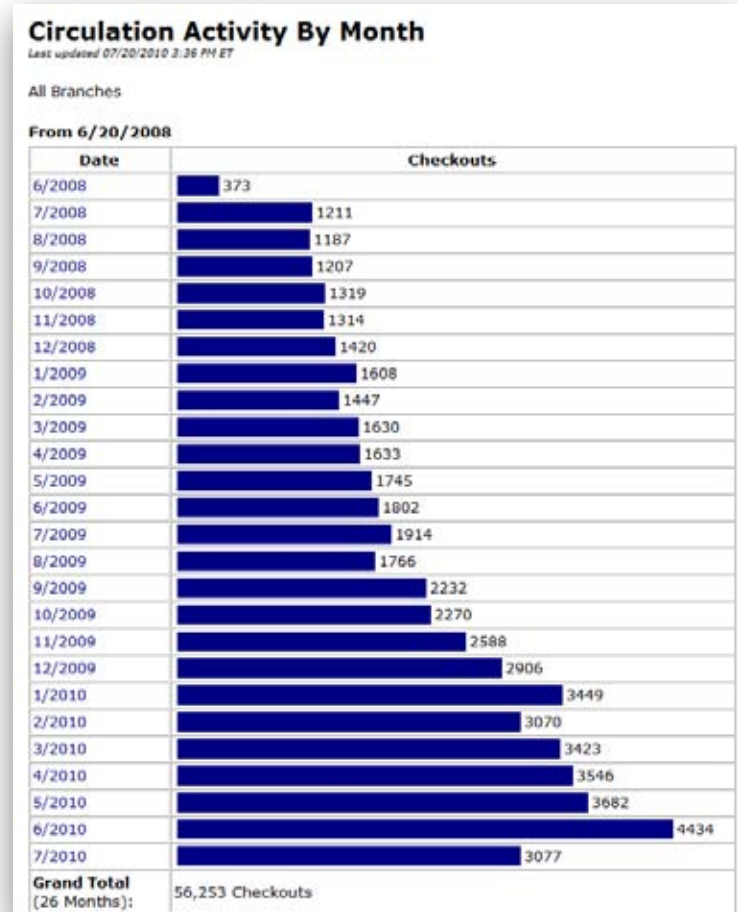
Compare checkouts by format or subject.

## Marketing:

Evaluate activity following a promotional campaign.

## Administration:

Track overall circulation.



# Turnover Rate Charts

## What is turnover?

The number of checkouts divided by the number of copies owned.

Think of turnover rate as the average number of checkouts per copy.

View turnover rate by title, subject, format, and publisher.

## Selectors:

What subject areas are high circulating but under-represented?

### Turnover Rate By Subject

Last updated: 10/12/2010 09:42 AM ET

All Branches

From 10/1/2009 through 9/30/2010

Subject	Turnover Rate (Checkouts / Owned)
Mythology	17 (17/1)
Human Rights	12 (12/1)
New Age	10.33 (31/3)
Women's Studies	10 (10/1)
Young Adult Literature	9.50 (19/2)
Romance	7.76 (1211/156)
Suspense	7.39 (798/108)
Thriller	6.63 (1378/208)
Mystery	6.56 (1167/178)
Management	6.33 (38/6)
Fantasy	5.54 (227/41)
Self-Improvement	5.53 (177/32)
Science Fiction & Fantasy	5.41 (433/80)
Psychology	5.38 (43/8)
Fiction	5.30 (9028/1703)
Young Adult Nonfiction	5.29 (37/7)
Horror	5.19 (187/36)
Science Fiction	5.18 (207/40)
Young Adult Fiction	5.04 (414/82)
Folklore	5 (10/2)
Literary Anthologies	5 (15/3)

# New Patron Registration

Track how many patrons have logged into your Virtual Branch website for the first time.



## New Patrons By Month

All Branches

From 7/20/2008

Date	Patrons
7/2008	81
8/2008	175
9/2008	123
10/2008	136
11/2008	167
12/2008	198
1/2009	187
2/2009	126
3/2009	132
4/2009	171
5/2009	178
6/2009	198
7/2009	186
8/2009	174
9/2009	169
10/2009	177
11/2009	204
12/2009	227
1/2010	256
2/2010	223
3/2010	208
4/2010	210
5/2010	201
6/2010	266
7/2010	156
<b>Grand Total:</b>	<b>4,529 Patrons</b>

Increase new patron registrations with an MP3 player raffle.

Contact [partnerservices@overdrive.com](mailto:partnerservices@overdrive.com) for more information.

# Patron Activity Chart

View the number of unique patrons that checked out titles by day, month, or branch.

## Marketing:

Compare new patron registration and patron activity.

## Administration:

Track overall patron usage.

### Unique Patrons With Checkouts By Month

All Branches

From 6/20/2008

Date	Patrons
6/2008	140
7/2008	342
8/2008	335
9/2008	297
10/2008	327
11/2008	346
12/2008	378
1/2009	423
2/2009	388
3/2009	402
4/2009	445
5/2009	442
6/2009	462
7/2009	460
8/2009	468
9/2009	491
10/2009	492
11/2009	564
12/2009	602
1/2010	688
2/2010	668
3/2010	700
4/2010	675
5/2010	732
6/2010	835
7/2010	662

# Current Waiting List & Waiting List History

View your **Current Waiting List**, and focus on the hold to copy ratio.

View your **Waiting List History** by day, month, publisher, format, title, subject, and branch.

## Selectors:

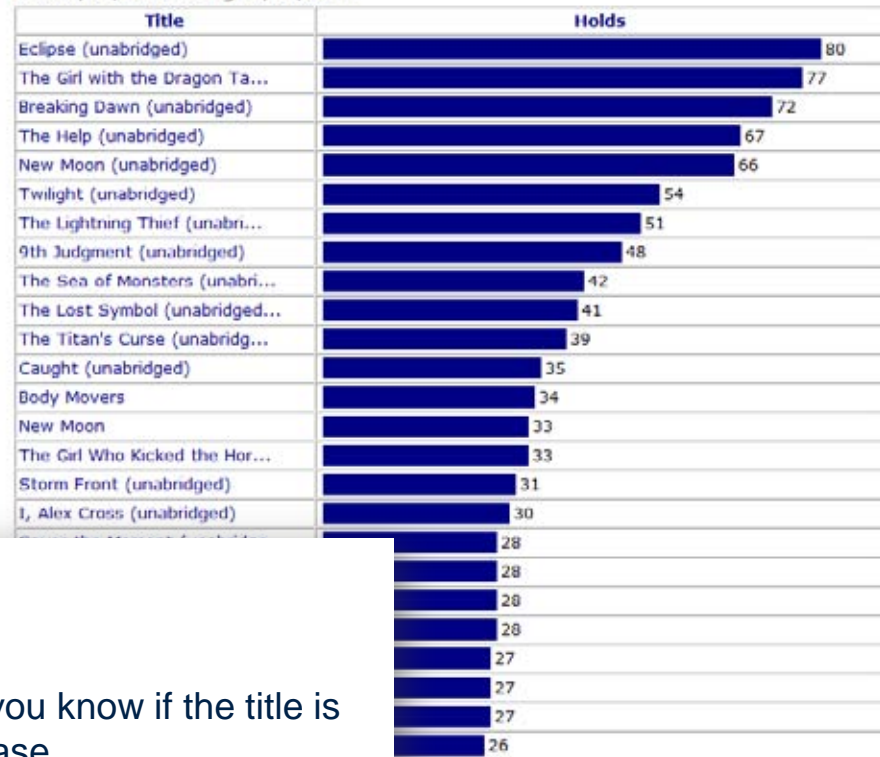
- „ Track your most requested titles.
- „ Compare the current waiting list to the waiting list history.
- „ What is the average wait period?

## Waiting List Activity By Title

Last updated 07/20/2010 10:07 AM ET

All Branches

From 7/20/2009 through 7/20/2010



## Current Waiting List as of 07/06/2011 10:34 AM ET

Branches: All

Total patrons on waiting list: 7,842  
 Average wait period: 12.96 days  
 Patrons on waiting list by format:  
 EPUB: 5,165  
 PDF: 206  
 OMA: 579  
 OAB: 1,492

**New:** "Avail for Purch" lets you know if the title is currently available for purchase.

Title	Creator	Publisher	ISBN	Fmt	Holds	Own Ratio	First Active Hold	Avail for Purch
1. The Pillars of the Earth (abridged)	Ken Follett	Penguin Group (USA), Inc.	9781429586764	OAB	31	1 31	01/22/2011	No
2. The Angel Experiment	James Patterson	Hachette Digital, Inc.		EPUB	17	1 17	04/16/2011	No

# Holds Manager

## What is Holds Manager?

- „ An automated way to fill digital holds.

## Why sign up?

- „ No searching or running reports.
- „ Holds Manager does the math for you.
- „ You can tailor a plan to your budget needs and hold ratio policy.

## How do we get started?

- „ In 'Marketplace' go to the 'Quick Links' box, and select 'Holds Manager'.

The screenshot shows the 'OverDrive Content Reserve' interface. The main heading is 'Holds Manager'. Below it, there is a form to configure holds. The form includes fields for 'Hold Criteria' (with a 'Ratio' input), 'How Often' (set to 'Daily'), 'Date to Start' (with a calendar icon), 'Purchase Order Display Name', 'Internal Purchase Order ID', 'Max Amount to Spend Monthly' (with a note to type 'No Max' if no limit is desired), and 'Max Copies Per Title' (with a similar note). A 'Confirm Plan...' button is at the bottom.

OverDrive  
Content Reserve  
Your Digital Library

Home Marketplace Collection Reports Users

### Holds Manager

Please select the specifics for your holds manager.  
(Fields marked by \* are required)

\* Hold Criteria: \* (Please select one of the following)  
 Ratio: \*

OR

Number of holds: \*

\* How Often: \*

\* Date to Start: \*

Purchase Order Display Name: \*

Internal Purchase Order ID: \*

\* Max Amount to Spend Monthly: \*  per calendar month  
Please type "No Max" if you do not wish to put a limit on the amount to spend.

\* Max Copies Per Title: \*   
Please type "No Max" if you do not wish to put a limit on the number of copies in your account.

**QUICK LINKS**

- [Critical Alerts](#)
- [Marketplace home](#)
- [Download Standing Order Plans](#)
- [Holds Manager](#)
- [OverDrive Community Reserve](#)
- [Books on Tape Pre-order](#)
- [ContentWire Newsletter Archive](#)

# Digital Library Statistics Report

A snapshot of overall and current statistics.

- „ Number of titles.
- „ Number of copies.
- „ Checkouts.
- „ Holds.
- „ Unique patrons.

Provides total numbers as well as a breakdown by format in each section.

## Administration:

This report can be included in meetings for a high level look at your Virtual Branch website.

## Digital Library Statistics

From inception to now | [Select Date Range](#)

- **Purchased Titles in Collection:** 46,215
  - Audiobook: 12,966
  - eBook: 30,945
  - Music: 1,279
  - Video: 1,025

*Please note the 'Purchased Titles' do not include Max Access subscription titles.*

- **Purchased Copies in Collection** (counting each copy of each format of a title): 64,551
  - Audiobook: 18,413
  - eBook: 43,753
  - Music: 1,346
  - Video: 1,039

*Please note the 'Purchased Copies' do not include Max Access subscription titles.*

- **HarperCollins Licensed eBooks in Collection:** 652
  - eBook: 652

- **Local Collection Titles in Collection:** 6
  - eBook: 6

- **OCR Titles in Collection:** 57
  - eBook: 8
  - Video: 49

# Traffic Report

## Page Request:

Number of pages that were viewed on the Virtual Branch website.

## Patron Session:

Number of patron sessions on the Virtual Branch website.

## Patron Referral:

A list of the top URLs that have directed patrons to your Virtual Branch website.



**Marketing Tip:** Add a web icon or feature banner to your library homepage or catalog.

## Website Traffic Report (09/01/2009 - 06/30/2010)

Show All | Show Mobile | Show Non-mobile

Show report with daily breakdown

for: 09/2009 | 10/2009 | 11/2009 | 12/2009 | 01/2010 | 02/2010 | 03/2010 | 04/2010 | 05/2010 | 06/2010

### Summary

Total page requests:	1,141,523
Total patron sessions:	77,469
Total patron referrals:	49,874
Average monthly page requests:	114,152
Average monthly patron sessions:	7,747
Average monthly patron referrals:	4,987
Average patron page visits:	15
Average patron session length:	30:20

### Page Request Breakdown (monthly)



### Patron Session Breakdown (monthly)



### Patron Referral Breakdown (top 50)



# Advantage Reports

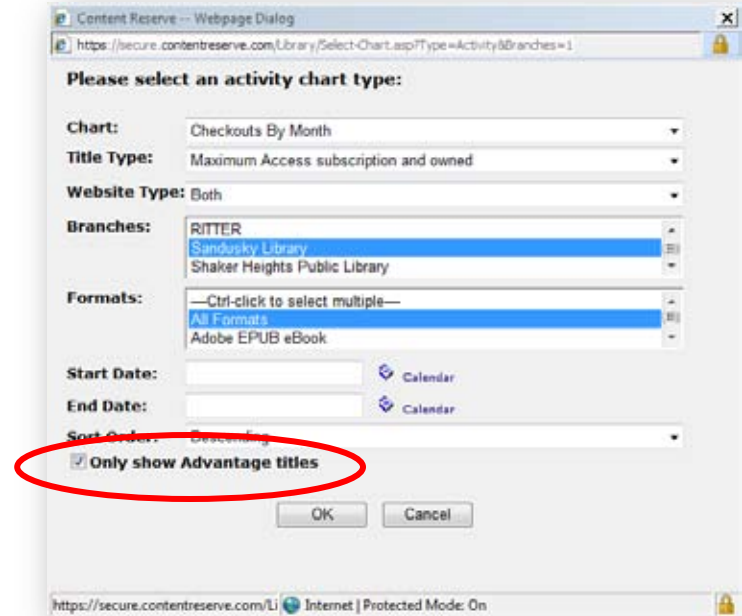
# Advantage reports

## Setting up reports

- „ Select your branch and check ‘Only show Advantage titles’ to see reports specific to your Advantage collection.

## Viewing reports

- „ Advantage-specific columns will appear where applicable: Owned, Current Checkouts, and Current Holds.



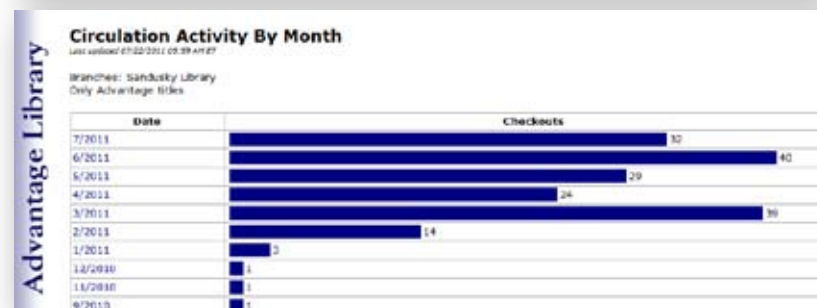
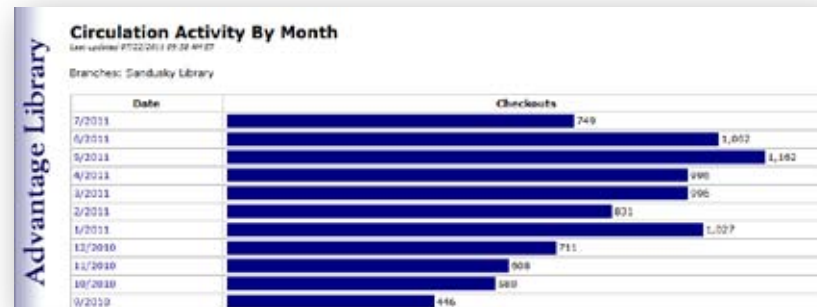
## Purchased Title Report

#	Title	Publisher	Creator	Added	Adv Own	Adv Curr Chks	Adv Curr Holds	Cons Own	Cons Curr Chks	Cons Curr Holds	Ovrl Chks	Turn.	Ovrl Holds
1.	1st to Die	Little, Brown and Company	James Patterson	08/27/2003	1	1	0	5	9	75	<a href="#">541</a>	28.5	456
2.	3rd Degree	Little, Brown and Company	James Patterson	03/25/2004	1	1	0	0	0	0	<a href="#">494</a>	49.4	132
3.	The 4-Hour Body	Crown Publishing Group	Timothy Ferriss	01/07/2011	1	0	0	4	4	6	<a href="#">32</a>	6.4	68
4.	The Accidental Billionaires	Knopf Doubleday Publishing Group	Ben Mezrich	08/21/2009	1	1	0	3	3	5	<a href="#">60</a>	15.0	106
5.	After Midnight	HarperCollins	Teresa Medeiros	09/29/2005	1	1	0	0	0	0	<a href="#">286</a>	31.8	15
6.	Again the Magic	HarperCollins	Lisa Kleypas	06/11/2004	1	1	0	1	1	5	<a href="#">295</a>	59.0	83

# Suggestions

## Activity Chart

- „ View Activity Chart by Month with your branch selected.
- „ Run the report again and check the box to ‘Only show Advantage titles’.
- „ Compare reports to see what percent of your total checkouts are Advantage titles.



## Current Waiting List

- „ Current Waiting List report allows you to evaluate Advantage holds.

## Current Waiting List

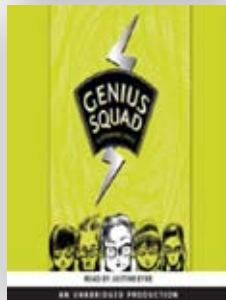
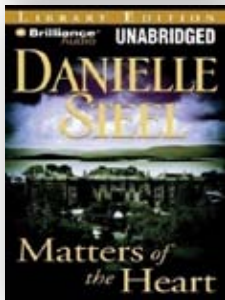
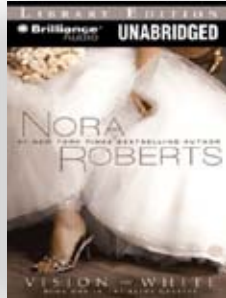
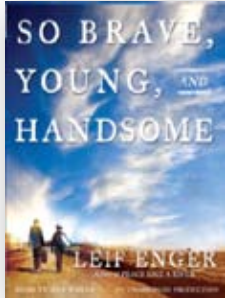
Title	Creator	Publisher	ISBN	Fmt	Holds	Adv Own	Adv Chk Lic Avail	Adv Chk Lic Used	Cons Own	Cons Chk Lic Avail	Cons Chk Lic Used	Ratio	First Active Hold	Adv Hold Rank	Avail for Purch
1. <a href="#">The Girl with the Dragon Tattoo</a>	Stieg Larsson	Random House, Inc.	9780307272119	EPUB	4	1	-	-	15	-	-	0.182	07/15/2011	5	Yes
2. <a href="#">The Help</a>	Kathryn Stockett	Penguin Group (USA), Inc.	9781440697661	EPUB	5	1	-	-	15	-	-	0.217	06/18/2011	10	Yes

# Goal Setting

# Selectors: Build a strong collection



**Action Item:** Check your Patron Activity Chart and set realistic goals.



- c Use reports to identify popular titles, subject areas, and formats.
- c Encourage activity from existing users by keeping your OverDrive collection fresh.
  - „ New titles.
  - „ New formats.
  - „ Additional copies of popular titles.

# Marketing: Reach new users



**Action Item:** Need promotional ideas? Contact [partnerservices@overdrive.com](mailto:partnerservices@overdrive.com).

Much of your community is unaware of your OverDrive service. There are always more users to reach!

- Set goals for your library's ideal percentage growth, and use reports to adjust those goals as needed.
- If you try the same promotion more than once, set new goals the next time you try the campaign.

**DOWNLOAD**  
audiobooks, eBooks *from your library*  
A more on your computer, cell phone, iPod®, or eBook reader

Variety of formats!

Available 24/7 from your library's website

Automatic return! No late fees.

All you need is an Internet connection and a library card

It's easy 1 Browse 2 Check out 3 Download Enjoy!

**DOWNLOAD**  
Audiobooks, eBooks, & more  
for your computer, cell phone, iPod® or eBook reader

It's Easy!

- 1 Browse your library's website
- 2 Check out with a valid library card
- 3 Download to PC, Mac®, & many mobile devices

Enjoy immediately or transfer to your iPod®, eBook reader, and other compatible devices.

Easy to Use  
No late fees  
Available 24/7

[http://\\*\\*\\*\\*.lib.overdrive.com](http://****.lib.overdrive.com)

# Administration: Size-up success



**Action Item:** Contact [training@overdrive.com](mailto:training@overdrive.com) for help with reports.

- c What are your targets for overall growth in the areas of circulation and collection?
- c Consortia members: Compare library to library statistics. How does your library compare to libraries of a similar size?

## Circulation Activity By Title

Last updated 07/20/2010 10:21 AM ET

All Branches

From 6/20/2008 through 6/20/2010

Title	Checkouts
Twilight (unabridged)	162
Breaking Dawn (unabridged)	160
New Moon (unabridged)	156
Atlas Shrugged (unabridged)	155
Eclipse (unabridged)	153
Twilight	132
The Host (unabridged)	110
Eclipse	95
The Lost Symbol (unabridged...)	94
New Moon	92
1st to Die (unabridged)	88
The Appeal (unabridged)	86
The 8th Confession (unabrid...)	82
2nd Chance (unabridged)	81
Pride and Prejudice (unabri...)	80
1984 (unabridged)	78
When You Are Engulfed in Fl...	77
Heart of Darkness (unabridg...)	77
Sail (unabridged)	75
24 Hours (unabridged)	75
7th Heaven (unabridged)	75
The Price of Silence (unabr...)	75
Death Qualified (unabridged...)	74
3rd Degree (unabridged)	72

# OverDrive Dashboard

# OverDrive Dashboard

A desktop application that provides quick access to real-time data from your Virtual Branch.

- „ View holds, titles, circulation, and traffic data.
- „ Refresh every 5, 15, 30, or 60 minutes.
- „ All areas of your service benefit from instant statistics.
- „ Consortia members: Break out statistics by branch.



**OverDrive Dashboard**

# Staff resources



# OverDrive Central: Online Learning Center

OverDrive Central is divided into four areas ...

- “ **View Now**: Need training right away? View our core courses at your convenience ... plus pause, stop and fast forward to suit your learning style.
- “ **Register**: Register here for live courses hosted by our Training team. These sessions focus on hot topics, and are open to staff members from OverDrive partners.
- “ **Resources**: Spread the word about your OverDrive service through free promotional and educational materials.
- “ **Networking**: Have questions, comments, or feedback? Connect with us and other partners through Facebook, Twitter, and our blog.



[www.overdrive.com/LearningCenter](http://www.overdrive.com/LearningCenter)

# Marketing resources

OverDrive's Partner Services can assist with your promotional efforts.

„ Business cards.

„ Bookmarks.

„ Brochures.

„ Posters.

„ Press releases.

„ Web link for your home page and catalog.

„ ... and more!

Visit our online marketing kit or contact us for more information:

<http://overdrive.com/Resources/PartnerServices/MarketingOutreach>

**DOWNLOAD**  
Audiobooks,  
eBooks,  
& more  
for your computer,  
cell phone, iPod®  
or eBook reader

**It's Easy!**

- 1 Browse**  
your library's website
- 2 Checkout**  
with a valid library card
- 3 Download**  
to PC, Mac®, & many mobile devices

Enjoy immediately or transfer to your iPod®, eBook reader, and other compatible devices.

- Easy to Use  
- No late fees  
- Available 24/7

[http://\\*\\*\\*.lib.overdrive.com](http://***.lib.overdrive.com)

**What You Need**

- An Internet connection via PC, Mac®, or select mobile devices.
- A valid library card.
- Free, required software available at your library's website.
  - For audiobooks on PC, Mac®, and mobile devices: OverDrive® Media Console™
  - For PDF and EPUB eBooks on PC, Mac®, and many eBook devices: Adobe® Digital Editions

**How It Works**

**Step 1: Browse**

1. Browse your library's website at [http://\\*\\*\\*.lib.overdrive.com](http://***.lib.overdrive.com).
2. Search by title, subject, author, or format.

**Step 2: Check Out**

1. Add selections to your 'Cart'. Note: If a title is not available, you may place a hold. You'll receive an email when the title is available.
2. Click on the 'Proceed to Checkout' link.

**Step 3: Download ... enjoy!**

1. Click the 'Download' button under each title to launch the software. See 'What You Need' (above) for required software.
2. Once downloaded, enjoy immediately or transfer to a variety of devices, including iPod®, Sony® Reader™, and other devices.

Titles will automatically expire at the end of the lending period. There are no late fees!

**Transfer to a Mobile Device**

After download, most titles can be transferred to a mobile device such as iPod® or Sony® Reader™. First connect your device, then:

1. For audio and video, click the 'Transfer' button in OverDrive® Media Console™ to launch the Transfer Wizard and follow the onscreen prompts.
2. After transfer is complete, you may disconnect your device and enjoy your title on the go.

Visit <http://www.overdrive.com/resources/drc> for a list of compatible devices.

**Burn to CD**

After download, many audio titles can be burned to CD. First insert your CD, then:

1. Click the 'Burn' button in OverDrive® Media Console™ to launch the Burn Wizard.
2. Select the part you wish to burn. When the burn process is complete, you may enjoy your title on the go.

**Help Resources**

Visit your library's website and click the 'Help' link for more information.

© 2010 OverDrive, Inc.

# Try this ...

- c Login to Content Reserve.
- c View reports.
- c Set targets to expand your collection, reach new patrons, and increase circulation.
- c Install OverDrive Dashboard for instant access to statistics.



# Contact us

- „ **Collection Development:**  
[collectionteam@overdrive.com](mailto:collectionteam@overdrive.com).
- „ **Training:**  
[training@overdrive.com](mailto:training@overdrive.com).
- „ **Library Partner Services:**  
[partnerservices@overdrive.com](mailto:partnerservices@overdrive.com).
- „ **Support:**  
[support@libraryreserve.com](mailto:support@libraryreserve.com).

*Support for library staff.*

*Please do not share this email with users.*

*Users should contact support via the email link on the main Help Page of your library's Virtual Branch Website.*



**Plus, connect with us!**

