

ADVANTAGE PLUS SHARING REVIEW PROCESS

Important Details about Advantage Plus Sharing

- *When an eligible title is shared, all copies of the title will be included.
- *Shared titles will still belong to the Advantage member library. Users of any library in the consortium can borrow or place holds on these titles, but Advantage users from the sharing library will have priority for holds.
- *Titles with active checkouts or holds can be shared **ONLY** if the Advantage Plus plan allows it.
- *All reports will show that the shared titles belong to the Advantage collection of the sharing library.
- *Your Collection Usage reports will include holds and checkouts for all users (Consortium users and your library's Advantage users).
- *By default, MARC records won't be ordered for shared titles.

NOTE: You can edit your plan at any time. However, once a title is shared, it cannot be reversed.

Set Your Advantage Plus Plan

You can setup your plan so that you manually review titles and select the titles to be shared **OR** you can set the plan to share all eligible titles automatically. This decision is made at the local library level.

Eligible Titles

Depending on the criteria you used for your Advantage Plus Plan (and the size of your Advantage collection), this can be a very large database of titles. So, it takes a long time to load and to navigate through the screens.

FACTORS ABOUT THE DATABASE OF TITLES TO KEEP IN MIND:

1. It only shows Advantage ownership of the titles. Consortium ownership is not shown. You CAN see checkouts and holds (**Total Checkouts and Holds:** checkouts and holds by any Consortium user since inception; **Active Checkouts and Holds:** the current checkouts and holds on the title by your Advantage users)
2. It includes titles that are Metered Access **AND have expired**

In theory, you would only want to share titles that were active (had not expired), otherwise it would not benefit the Consortium at all and it would do a disservice to the patrons that saw them thinking there was a copy when there really wasn't.

Also, we made a note of these titles to check on the need to re-purchase for our Advantage collection.

3. Titles that have already been shared with the Consortium by other Advantage libraries are not indicated.

Again, our thinking was to share the titles that would most benefit the Consortium. Unless there was a Consortium demand for one of these titles we opted to keep it in our collection

IF YOU CHOOSE TO MANUALLY SELECT THE TITLES TO SHARE:

You can work from it on the computer, if it's not too large. Otherwise, you can create an Excel worksheet for it and review the titles there first (sortable, etc.)

TIP: Because titles owned by the Consortium aren't indicated in the list of eligible titles, you will need to run a separate report and compare that with the **Eligible Titles** list.

You need to run a **"Title Status and Usage"** report with the criteria set as shown:

After the report runs, you should then be able to identify:

Which **OC/OU** titles are currently owned by the Consortium (Consortium/Advantage)

	Title	Creator	Audi...	Subj...	Format	Owned
1	A Curious Mind: Th...	Grazer, Brian	Adult...	Biogr...	📖	0 / 9
2	Rogue Lawyer	Grisham, John	Adult...	Fictio...	📖	37 / 6
3	Tricky Twenty-Tw...	Evanovich, J...	Adult...	Fictio...	📖	30 / 6
4	The Fix	Baldacci, David	Adult...	Fictio...	📖	23 / 5
5	A Game of Throne...	Martin, Geor...	Adult...	Fant...	📖	17 / 5
6	The Girl in the Spid...	Lagercrantz, ...	Adult...	Fictio...	📖	28 / 5
7	The Girl on the Tra...	Hawkins, Paula	Adult...	Fictio...	📖	33 / 5
8	Gone Girl: A Novel	Flynn, Gillian	Adult...	Fictio...	📖	74 / 5
9	Grey: Fifty Shades...	James, E L	Adult...	Eroti...	📖	29 / 5
10	The Martian: A No...	Weir, Andy	Adult...	Fictio...	📖	42 / 5

Which **Metered Access** titles are currently in the Consortium collection that have Licenses left (Consortium/Advantage)

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	Title	Creator	Audi...	Subj...	Format	Owned	Adv Plus shared	Licenses owned	#/# = cons. / adv. Licenses left
1	Come Sundown	Roberts, Nora	Adult...	Fictio...	📖	0 / 0	2 / 0	832 / 208	701 / 172
2	Truly Madly Guilty	Moriarty, Liane	Adult...	Fictio...	📖	0 / 0	3 / 0	1,352 / 260	846 / 165
3	Harry Potter and t...	Rowling, J.K.	Juve...	Fant...	📖	0 / 0	7 / 0	2,028 / 260	1,133 / 164
4	Down a Dark Road...	Castillo, Linda	Adult...	Fictio...	📖	0 / 0	0 / 0	104 / 156	94 / 142
5	The Weekenders: ...	Andrews, Ma...	Adult...	Fictio...	📖	0 / 0	4 / 0	728 / 208	359 / 136
6	One with You: Cro...	Day, Sylvia	Adult...	Fictio...	📖	0 / 0	2 / 0	260 / 156	102 / 135
7	Killing the Rising S...	O'Reilly, Bill	Adult...	Histo...	📖	0 / 0	2 / 0	312 / 156	188 / 126
8	Orphan Train: A N...	Baker Kline, ...	Adult...	Fictio...	📖	0 / 0	0 / 0	1,196 / 260	72 / 109
9	My Life, My Love, ...	King, Coretta...	Adult...	Afric...	📖	0 / 0	0 / 0	- / 104	- / 104
10	The Nightingale: A...	Hannah, Kristin	Adult...	Fictio...	📖	0 / 0	4 / 0	2,704 / 260	1,133 / 103

Which titles have already been shared from another Advantage library

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	Title	Creator	Audi...	Subj...	Format	Owned	Adv Plus shared		
1	Rogue Lawyer	Grisham, John	Adult...	Fictio...	📖	37 / 6	11 / 0		
2	Miss Peregrine's H...	Riggs, Ransom	Youn...	Fant...	📖	15 / 2	8 / 0		
3	The Goldfinch: A N...	Tartt, Donna	Adult...	Fictio...	📖	4 / 4	7 / 0		
4	Harry Potter and t...	Rowling, J.K.	Juve...	Fant...	📖	0 / 0	7 / 0		
5	The Things They C...	O'Brien, Tim	Youn...	Histo...	📖	3 / 1	7 / 0		
6	Tricky Twenty-Tw...	Evanovich, J...	Adult...	Fictio...	📖	30 / 6	7 / 0		
7	14th Deadly Sin: ...	Patterson, J...	Adult...	Fictio...	📖	5 / 1	6 / 0		
8	The Litigators	Grisham, John	Adult...	Fictio...	📖	23 / 1	6 / 0		
9	Make Me: Jack Re...	Child, Lee	Adult...	Fictio...	📖	23 / 3	6 / 0		
10	The Martian: A No...	Weir, Andy	Adult...	Fictio...	📖	42 / 5	6 / 0		

You can create a worksheet from this report and sort it by the above criteria and color code each, for your information.

In the Eligible titles Worksheet that you created first, you'll want to remove the titles that are:
 currently checked out
 currently on hold by your patrons
 the Metered Access titles with no Licenses left

You now have most of the information that you'll need to effectively review Eligible titles list.

Once you've analyzed and compared the two Worksheets, and have an eligible list of titles to share, save a final Worksheet of the eligible titles that you are going to share, for your reference.

Then, go back to the **Advantage Plus** page in Marketplace and **Review** titles. From there you can choose the titles to share.

To most efficiently navigate this list, remove all the columns that aren't useful to you and change the number of titles per page to 100 (or more). This would hopefully minimize the need to scroll back and forth and speed up the process.

Click the box next to each title on the page that you wish to share, then click **Share** at the top right. You can only share titles one page at a time, so this can take some time. **PATIENCE IS REQUIRED!**

Follow-up

Once you've shared titles with the Consortium, you may want to see how well those titles are circulating. Here's an article covering how to do this (under **Circulation Activity Report**):

<https://help.marketplace.overdrive.com/customer/en/portal/articles/2786505-how-do-i-see-checkouts-for-my-shared-advantage-plus-titles-by-just-my-advantage-users-or-by-all-users-?b id=15212>

The key criteria are:

Branch: choose **All branches**

Advantage Checkouts: choose “**show all checkouts on Advantage-owned titles**” (you want to see all Advantage-owned circs. and narrow down to the titles that were purchased for **YOUR** Advantage collection)

Period Type: **Specific** (so that you can choose a date range in the next two boxes) Once you run the report, create a worksheet for each format and sorting it by **Bought By**. Next, look for “Adv- (your library’s name)” and delete the titles that weren’t bought by your Advantage library.

Then count the number of circulations during the selected time period for each format.

If you want to see the bigger picture, click on any title in the database and it will show the total circulations since inception and which were Advantage circs.

From this, you can make a good estimation of the total circs. since the title had been shared.

If you have questions, feel free to contact me directly:

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