

Recommended Smart List Parameters

“Smart lists”, including holds managers, are an excellent way to save time and money while managing your system’s holds and recommended titles.

Two lists we recommend every system set up are to manage metered titles by time and by checkouts. Once set up, these will allow your system to identify only titles with expired licenses that have holds on them. Setting up these smart lists can save your system thousands of dollars a year by purchasing on a “just in time” basis instead of repurchasing every license that expires. This is a great way to manage demand efficiently.

Here are the lists with their parameters the consortium uses to manage metered titles:

Zero Checkouts Remaining With Holds

Select the following parameters for User Demand and Budget:

User demand and budget

- * Do you want to limit the number of titles to include on this Smart List?
 - Yes; limit this Smart List to titles.
 - No limit; include all titles that match this Smart List's criteria.

- * Do you want to limit how much you spend per cart? A cart is created each time this Smart List runs.
Enter a whole value (ex: 20 not 19.99).
 - No limit; include all titles that match this Smart List's criteria.
 - Yes; I don't want to spend more than USD per cart.

- * How many copies of each title should be added?
 copies.

- * Do you want to limit the total number of copies of a given title in your collection?
 - Yes; I don't want to own more than copies of any title.
 - No; always add as many copies as I specified above.

- * Do you want to exclude titles based on price?
Enter a whole value (ex: 20 not 19.99).
 - No; include all titles.
 - Yes; exclude titles priced more than USD.

- * This Smart List could create a large cart. How would you like the titles sorted?
Order titles by

Select the following parameters for Metered Access Management:

Smart List specifics

Metered Access management

Do you want to include Metered Access titles?

- Yes; include Metered Access titles.
 No; exclude Metered Access titles.

Do you want to *only* include Metered Access titles?

- No; include titles in all lending models.
 Yes; include only titles in the following Metered Access lending models:

MA: by time

For example, some publishers allow 12 months of circulation per copy.

- Include titles when the final copy in my collection is days or less from expiration.

- Only include titles with or more total checkouts.

- Only include titles with or more active holds.

MA: by checkout

For example, some publishers allow 26 checkouts per copy.

- Include titles when 0 checkouts or less remain in my collection.

- Only include titles with 0 or more total checkouts.

- Only include titles with 1 or more active holds.

* If a title is available in multiple lending models:

- Add the title to a cart for review.
Your plan will add the title to a cart for you to review and select the lending model you prefer.
 Add the title in the OC/OU model.
When available, your plan will add the title in the OC/OU model to your cart.
 Add the title in the MA model.
When available, your plan will add the title in the MA model to your cart.

* If a title is available in multiple Metered Access lending models:

- Add the title to a cart for review.
 Add the title under the model with the most amount of time or checkouts.
 Add the title under the model with the least amount of time or checkouts.

General policies

Do you want to include all formats?

- Yes; include all formats.
 No; include only the following formats: Audiobooks
 Ebooks
 Video

Do you want to include titles based on their on sale date?

- No; include all titles.
 Yes; include only titles for sale in the

Do you want to add titles based on their street date?

- No; include all titles.
 Yes; include only titles with streetdates from:

Do you want to include preorder titles?

- Yes
 No

Advanced filters

Audience

Include all

Adult Fiction
Adult Nonfiction
Juvenile Fiction
Juvenile Nonfiction
Young Adult Fiction
Young Adult Nonfiction

Include only

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Choose to have the plan run weekly on a specific day of the week.

Here is a summary of the parameter settings:

- There is no budget cap on Smart List purchases.
- Do not order more than 1 copy(s) of any title.
- Do not cap the number of copies in my collection.
- Include Metered Access content.
- Include titles in the following lending models:
- MA: by time (one user)
- Include titles when 0 checkout(s) remain(s) in your collection.
- Only include titles with 0 or more total checkouts.
- Only include titles with 1 or more active holds.
- Your plan will add the title to a cart for you to review and select the lending model you prefer.
- Add Metered Access titles to a cart for you to review and select a lending model.
- Include all formats in this Smart List.
- Do not limit titles by on sale date.
- Do not limit titles by street date.
- Exclude preorder titles.

Zero Time Remaining with Holds

Select the following parameters for User Demand and Budget:

User demand and budget

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- * Do you want to limit how much you spend per cart? A cart is created each time this Smart List runs. No limit; include all titles that match this Smart List's criteria. Yes; I don't want to spend more than USD per cart.
Enter a whole value (ex: 20 not 19.99).
- * How many copies of each title should be added? copies.
- * Do you want to limit the total number of copies of a given title in your collection? Yes; I don't want to own more than copies of any title. No; always add as many copies as I specified above.
- * Do you want to exclude titles based on price? No; include all titles. Yes; exclude titles priced more than USD.
Enter a whole value (ex: 20 not 19.99).
- * This Smart List could create a large cart. How would you like the titles sorted? Order titles by

Select the following parameters for Metered Access Management:

Smart List specifics

Metered Access management

- Do you want to include Metered Access titles?
- Yes; include Metered Access titles.
 No; exclude Metered Access titles.
- Do you want to *only* include Metered Access titles?
- No; include titles in all lending models.
 Yes; include only titles in the following Metered Access lending models:
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For example, some publishers allow 12 months of circulation per copy.
- Include titles when the final copy in my collection is days or less from expiration.
 - Only include titles with or more total checkouts.
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- MA: by checkout
For example, some publishers allow 26 checkouts per copy.
- Include titles when checkouts or less remain in my collection.
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- * If a title is available in multiple lending models:
- Add the title to a cart for review.
Your plan will add the title to a cart for you to review and select the lending model you prefer.
- Add the title in the OC/OU model.
When available, your plan will add the title in the OC/OU model to your cart.
- Add the title in the MA model.
When available, your plan will add the title in the MA model to your cart.
- * If a title is available in multiple Metered Access lending models:
- Add the title to a cart for review.
 Add the title under the model with the most amount of time or checkouts.
 Add the title under the model with the least amount of time or checkouts.

General policies

- Do you want to include all formats?
- Yes; include all formats.
 No; include only the following formats: Audiobooks
 Ebooks
 Video
- Do you want to include titles based on their on sale date?
- No; include all titles.
 Yes; include only titles for sale in the
- Do you want to add titles based on their street date?
- No; include all titles.
 Yes; include only titles with streetdates from:
- Do you want to include preorder titles?
- Yes
 No

Advanced filters

Audience

Include all

Adult Fiction
Adult Nonfiction
Juvenile Fiction
Juvenile Nonfiction
Young Adult Fiction
Young Adult Nonfiction

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Include only

Choose to have the plan run weekly on a specific day of the week.

Here is a summary of the parameter settings:

- 0 Time Remaining w/ Holds - 0 Time Remaining w/ Holds
- There is no budget cap on Smart List purchases.
- Do not order more than 1 copy(s) of any title.
- Do not cap the number of copies in my collection.
- Include Metered Access content.
- Include titles in the following lending models:
 - MA: by checkout (one user)
- Include titles when the final copy in your collection is 0 day(s) from expiration.
- Only include titles with 0 or more total checkouts.
- Only include titles with 1 or more active holds.
- Your plan will add the title to a cart for you to review and select the lending model you prefer.
- Add Metered Access titles to a cart for you to review and select a lending model.
- Include all formats in this Smart List.
- Do not limit titles by on sale date.
- Do not limit titles by street date.
- Exclude preorder titles.

For questions or assistance, please contact Daiva Madjar dmadjar@overdrive.com