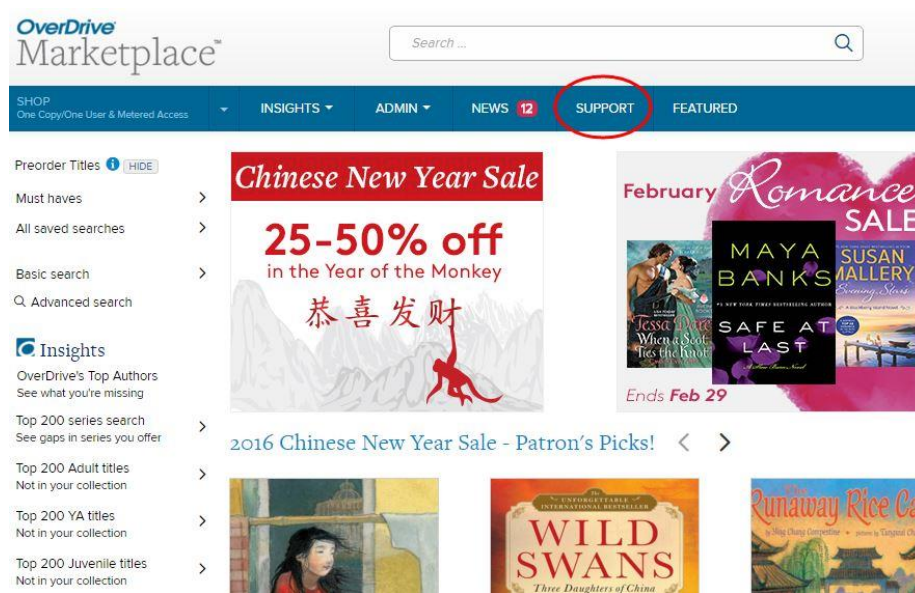


WPLC OverDrive Support Course: Using OverDrive Marketplace

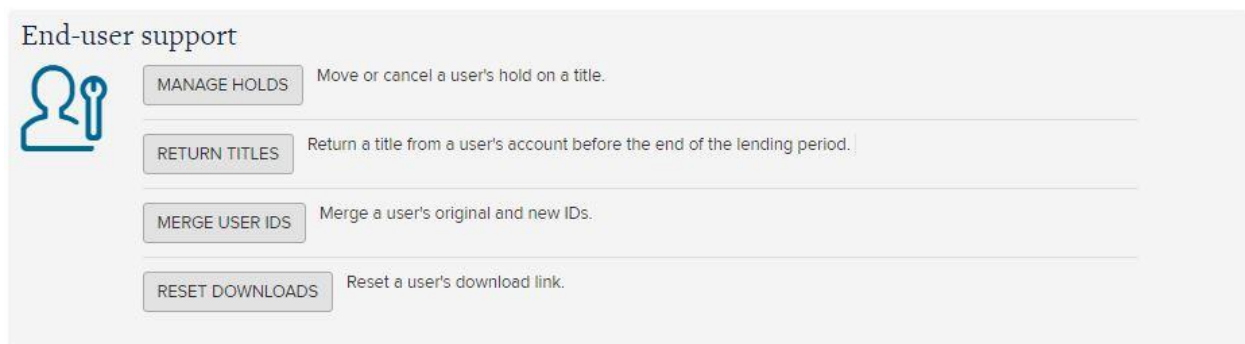
Updated January 2018

[Manage Holds](#) | [Return Titles](#) | [Merge User IDs](#) | [Reset Downloads](#)

To access OverDrive's Marketplace, log in at <https://marketplace.overdrive.com/>, then click on the Support tab. If you don't know your login information, please contact your public library system for assistance.




This walkthrough will help you use the three tools listed there under End User Support: Manage holds, Return titles, Merge Barcode Activity, and Reset downloads.



Manage Holds

End-user support

 **MANAGE HOLDS** Move or cancel a user's hold on a title.

RETURN TITLES Return a title from a user's account before the end of the lending period.

MERGE USER IDS Merge a user's original and new IDs.

RESET DOWNLOADS Reset a user's download link.

Clicking on Manage Holds will display three search options: Title, Barcode, and User email address. To find the holds in a patron's account, enter their barcode or email address. Click Search. [Note: If you can't find any holds with a barcode, it's good practice to search again by the patron's email address. You should also search by email if you suspect a patron has two active card numbers.]

Once the desired hold is found, you can either cancel it on the user's behalf or move the u

Search X

Title:

Barcode:

User email address:

This patron has 3 holds. Here you can see the patron's email address, barcode, the title, subtitle, edition, creator, format (not yet chosen because it's a hold) and what place there are in line for the hold.

Manage Holds

Search for a hold by title, barcode, or email address. Once the desired hold is found, you can either cancel it on the user's behalf or move the user's place on the holds list.

New search									
	Edit	User email address	Barcode	Title ↕	Subtitle	Edition	Creator	Format	Place
1		SuperVeg@wils.org	29078007447...	Going Vegetarian	A Healthy Guide to Makin...		Rau, Dana Mea...		hold 1 of 1
2		SuperVeg@wils.org	29078007447...	The Southern Vegetarian Cookbook	100 Down-Home Recipe...		Burks, Justin Fox		hold 8 of 8
3		SuperVeg@wils.org	29078007447...	Vegetarian Suppers from Deborah Madison's ...			Madison, Debo...		hold 1 of 1

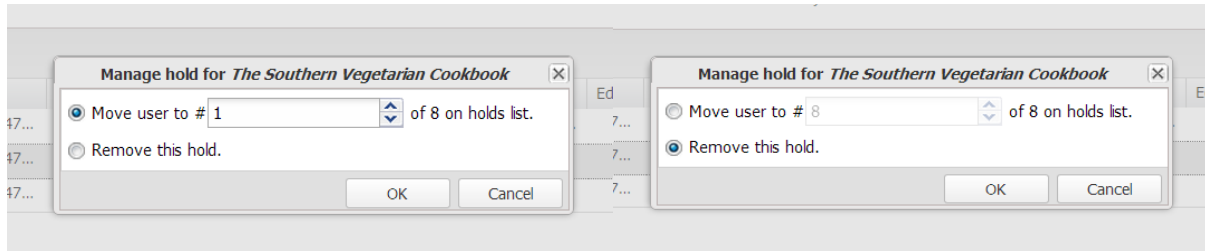
To adjust their position in line, click the blue pencil edit icon to the left of the correct title.

Manage Holds

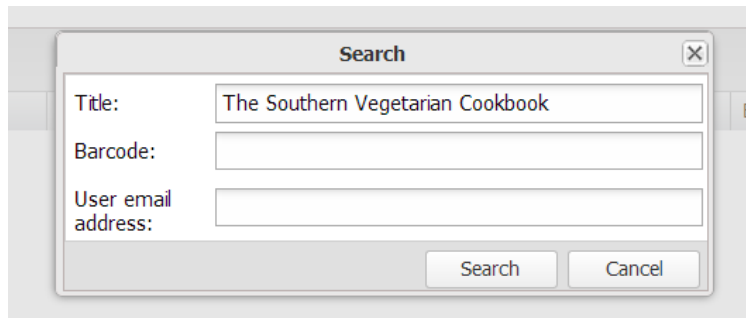
Search for a hold by title, barcode, or email address. Once the desired hold is found, you can either cancel it on the user's behalf or move the user's place on the holds list.

New search									
	Edit	User email address	Barcode	Title ↕	Subtitle	Edition	Creator	Format	Place
1		SuperVeg@wils.org	29078007447...	Going Vegetarian	A Healthy Guide to Makin...		Rau, Dana Mea...		hold 1 of 1
2		SuperVeg@wils.org	29078007447...	The Southern Vegetarian Cookbook	100 Down-Home Recipe...		Burks, Justin Fox		hold 8 of 8
3		SuperVeg@wils.org	29078007447...	Vegetarian Suppers from Deborah Madison's ...			Madison, Debo...		hold 1 of 1

Then, enter the position you wish them to be (usually this is #1, which means they will be notified the title is available when the next copy is returned). Or, you can select to remove the hold. Click OK.



You can also search by Title to see all the current holds.



And here they are!


Manage Holds

Search for a hold by title, barcode, or email address. Once the desired hold is found, you can either cancel it on the user's behalf or move the user's place on the holds list.

										New search
	Edit	User email address	Barcode	Title ^	Subtitle	Edition	Creator	Format	Place	
1		july_coleson@yahoo.com	26120003778...	The Southern Vegetarian Cookbook	100 Down-Home Recipe...		Burks, Justin Fox		hold 1 of 8	
2		xxmagpccs@kayser@hct...	Call61002723...	The Southern Vegetarian Cookbook	100 Down-Home Recipe...		Burks, Justin Fox		hold 2 of 8	
3		ak7364@gmail.com	25260007176...	The Southern Vegetarian Cookbook	100 Down-Home Recipe...		Burks, Justin Fox		hold 3 of 8	
4		sems094223@hotmail.com	26120002261...	The Southern Vegetarian Cookbook	100 Down-Home Recipe...		Burks, Justin Fox		hold 4 of 8	
5		moredeley@gmail.com	25260005404...	The Southern Vegetarian Cookbook	100 Down-Home Recipe...		Burks, Justin Fox		hold 5 of 8	
6		ezozk@icm.com	25240001337...	The Southern Vegetarian Cookbook	100 Down-Home Recipe...		Burks, Justin Fox		hold 6 of 8	
7		japs2000@yahoo.com	23414001904...	The Southern Vegetarian Cookbook	100 Down-Home Recipe...		Burks, Justin Fox		hold 7 of 8	
8		Superveg@uk.org	29078007447...	The Southern Vegetarian Cookbook	100 Down-Home Recipe...		Burks, Justin Fox		hold 8 of 8	

Return Titles

End-user support



MANAGE HOLDS Move or cancel a user's hold on a title.

RETURN TITLES Return a title from a user's account before the end of the lending period.

MERGE USER IDS Merge a user's original and new IDs.

RESET DOWNLOADS Reset a user's download link.



Like Manage Holds, clicking Return Titles will bring up three search options: Title, Barcode, User Email Address. Searching Barcode or Email Address will show all the titles checked out to a patron. Searching Title will show all the current checkouts for that title. This tool is also handy for seeing what formats of a title a patron has checked out.

To return a title or see what formats are checked out, search by barcode or email address. This will show the user's email address, barcode, the title, subtitle, edition, creator, format, and checkout date.

Return Titles

Search for a checkout by title, barcode, or email address. Once the desired checkout is found, you can return it to your collection from the user's account.




Return title(s)

									New search
<input type="checkbox"/>		User email address ↕	Barcode	Title	Subtitle	Edition	Creator	Format	Checkout date
<input type="checkbox"/>	1	derek.keller@yale...	20029000114021	The Eat-Clean Diet@...			Buchner, Kierstin et al.		01/22/2014
<input type="checkbox"/>	2	dimg@ms@gmail.com	20078617999973	The Eat-Clean Diet@...			Buchner, Kierstin et al.		01/21/2014
<input type="checkbox"/>	3	kkj.acroy@gmail.com	25253001189782	The Eat-Clean Diet@...			Buchner, Kierstin et al.		01/10/2014

Then select the checkbox to the left of the title you want to return and click Return Title(s).
[Note: The Return Title(s) button is grayed out until you select a title to return.]

Return Titles

Search for a checkout by title, barcode, or email address. Once the desired checkout is found, you can return it to your collection from the user's account.




									New search
<input type="checkbox"/>	User email address ^	Barcode	Title	Subtitle	Edition	Creator	Format	Checkout date	
<input checked="" type="checkbox"/>	1 SuperVeg@wls.org	29078007447652	Fix-It and Forget-It ...			Good, Phyllis Pellman		01/28/2014	
<input type="checkbox"/>	2 SuperVeg@wls.org	29078007447652	Becoming Vegetarian	The Complete Guide...	2	Davis R.D., Brenda e...		01/28/2014	
<input type="checkbox"/>	3 SuperVeg@wls.org	29078007447652	Monkey Mind	A Memoir of Anxiety	Unabridged	Smith, Daniel B. et al.		01/28/2014	

To easily select multiple titles, use CTRL + click (Windows) or Shift + click (Mac).

You can also search by title to see the current checkouts.

Return Titles


Search for a checkout by title, barcode, or email address. Once the desired checkout is found, you can return it to your collection from the user's account.

									New search
<input type="checkbox"/>	User email address ^	Barcode	Title	Subtitle	Edition	Creator	Format	Checkout date	
<input type="checkbox"/>	1	CAFE100323927	Gone Girl	A Novel		Flynn, Gillian		01/26/2014	
<input type="checkbox"/>	2	234810005011119	Gone Girl	A Novel		Flynn, Gillian		01/20/2014	
<input type="checkbox"/>	3	1392584	Gone Girl	A Novel		Flynn, Gillian		01/24/2014	

Merge User IDs

You can use this function to move patrons' card information - holds, checkouts, and lists - to a new card.

End-user support



MANAGE HOLDS Move or cancel a user's hold on a title.

RETURN TITLES Return a title from a user's account before the end of the lending period.

MERGE USER IDS Merge a user's original and new IDs.

RESET DOWNLOADS Reset a user's download link.

Then you'll be able to enter the original and the new barcodes and click Merge. The Merge button will be grayed out until barcodes are entered into the spaces provided.

Merge barcode activity

Search for a user's original and new barcodes (library cards or other IDs they use to sign into your site), then click **Merge**. This will allow the user to retain their account activity from their original card (checkouts, holds, wish list, etc.) when they switch to their new card.

Please note: For reporting purposes, historical activity associated with the original barcode will remain associated with that barcode. Any activity after this merge will be associated with whichever barcode the user uses to sign into your public-facing website.

Original barcode

Enter and search for the user's original barcode. If your library uses a value other than barcode for user verification (e.g. record ID, username, token ID), search by that value.

New barcode

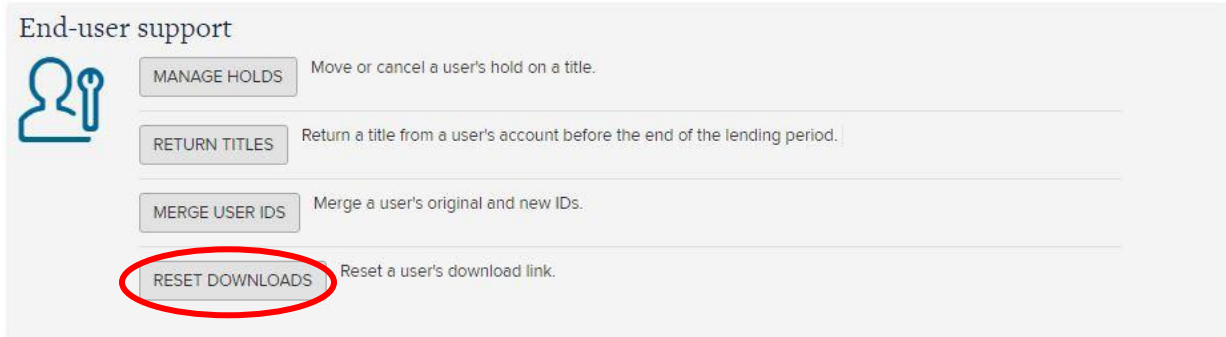
Enter and search for the user's new barcode (or record ID, username, token ID, etc.).

Search

Merge

Reset Downloads

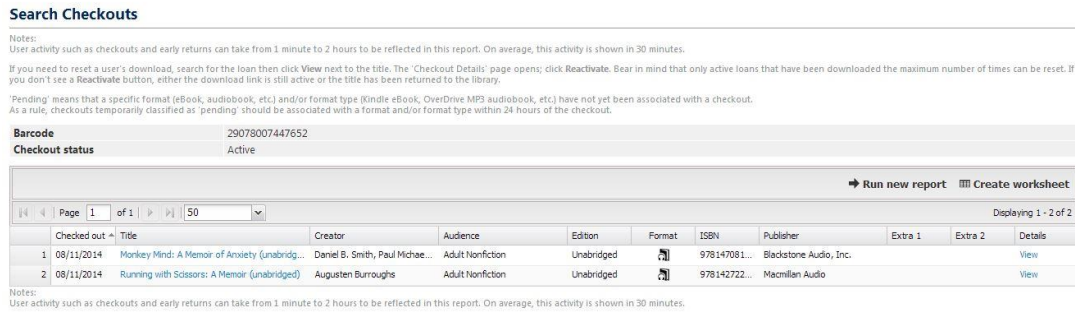
You can use this function to reset users downloads if they reach their limit, which is usually three. After you click Reset Downloads, you can search by Barcode, Title, or Checkout ID (which is not used).



End-user support

- MANAGE HOLDS** Move or cancel a user's hold on a title.
- RETURN TITLES** Return a title from a user's account before the end of the lending period.
- MERGE USER IDS** Merge a user's original and new IDs.
- RESET DOWNLOADS** Reset a user's download link.

After you search by a patron's email or barcode, you'll see this:



Search Checkouts

Notes:
User activity such as checkouts and early returns can take from 1 minute to 2 hours to be reflected in this report. On average, this activity is shown in 30 minutes.

If you need to reset a user's download, search for the loan then click View next to the title. The 'Checkout Details' page opens; click Reactivate. Bear in mind that only active loans that have been downloaded the maximum number of times can be reset. If you don't see a Reactivate button, either the download link is still active or the title has been returned to the library.

Pending means that a specific format (eBook, audiobook, etc.) and/or format type (Kindle eBook, OverDrive MP3 audiobook, etc.) have not yet been associated with a checkout. As a rule, checkouts temporarily classified as *pending* should be associated with a format and/or format type within 24 hours of the checkout.

Barcode: 29078007447652
Checkout status: Active

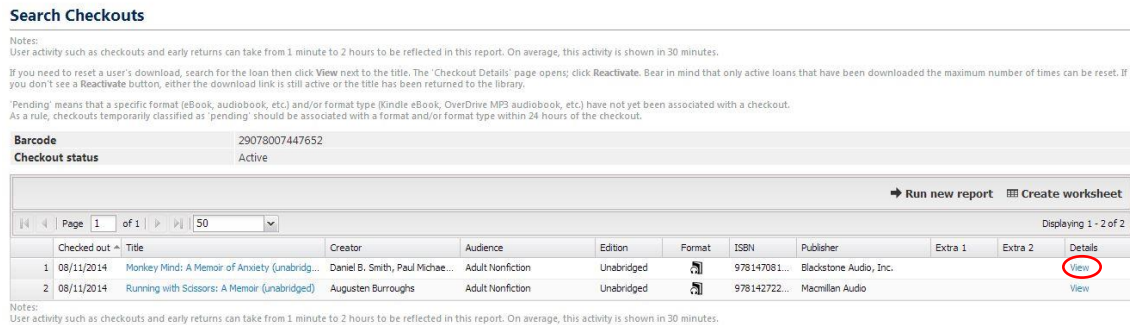
Run new report Create worksheet

Page 1 of 1 | 50 | Displaying 1 - 2 of 2

Checked out	Title	Creator	Audience	Edition	Format	ISBN	Publisher	Extra 1	Extra 2	Details
1	08/11/2014	Monkey Mind: A Memoir of Anxiety (unabridg...	Daniel B. Smith, Paul Michae...	Adult Nonfiction	Unabridged	978147081...	Blackstone Audio, Inc.			View
2	08/11/2014	Running with Scissors: A Memoir (unabridged)	Augusten Burroughs	Adult Nonfiction	Unabridged	978142722...	Macmillan Audio			View

Notes:
User activity such as checkouts and early returns can take from 1 minute to 2 hours to be reflected in this report. On average, this activity is shown in 30 minutes.

To reset a patron's downloads, select the View link to the right of the title.



Search Checkouts

Notes:
User activity such as checkouts and early returns can take from 1 minute to 2 hours to be reflected in this report. On average, this activity is shown in 30 minutes.

If you need to reset a user's download, search for the loan then click View next to the title. The 'Checkout Details' page opens; click Reactivate. Bear in mind that only active loans that have been downloaded the maximum number of times can be reset. If you don't see a Reactivate button, either the download link is still active or the title has been returned to the library.

Pending means that a specific format (eBook, audiobook, etc.) and/or format type (Kindle eBook, OverDrive MP3 audiobook, etc.) have not yet been associated with a checkout. As a rule, checkouts temporarily classified as *pending* should be associated with a format and/or format type within 24 hours of the checkout.

Barcode: 29078007447652
Checkout status: Active

Run new report Create worksheet

Page 1 of 1 | 50 | Displaying 1 - 2 of 2

Checked out	Title	Creator	Audience	Edition	Format	ISBN	Publisher	Extra 1	Extra 2	Details
1	08/11/2014	Monkey Mind: A Memoir of Anxiety (unabridg...	Daniel B. Smith, Paul Michae...	Adult Nonfiction	Unabridged	978147081...	Blackstone Audio, Inc.			View
2	08/11/2014	Running with Scissors: A Memoir (unabridged)	Augusten Burroughs	Adult Nonfiction	Unabridged	978142722...	Macmillan Audio			View

Notes:
User activity such as checkouts and early returns can take from 1 minute to 2 hours to be reflected in this report. On average, this activity is shown in 30 minutes.

On the next screen, include a reason for the reset if you can (in green box below). Then click Reset User's Download Link (in red). [Notes: The Reset user's Download Link will only appear when the user is out of downloads. Also, it can take a bit to reset the link after you click the button.]

Checkout details

080-1435278-00003 Wisconsin Public Library Consortium (WI)

Monkey Mind

Lending period	7 days
Checked out	1/28/2014
Downloaded	1/28/2014
Downloads remaining	0
Status	Active
Format	OverDrive MP3 Audiobook

Reset user's download link

User error - internet connection problem

After the reset is complete, you'll get a confirmation message in green that the "user's download link has been reset" and the user will again have three downloads.

OverDrive Marketplace

Hello again, [General Support WILS](#) Wisconsin Public Library Consortium (WI) Prices shown in USD

SEARCH Search... GO

VIEW CARTS

RTL Jan 2014 \$15.95

CHECKOUT

SHOP One Copy / One User & Metered Access LOCAL CONTENT MARC REPORTS INVOICING NEWS 8 SUPPORT

The user's download link has been reset.

Checkout details

080-1435278-00003 Wisconsin Public Library Consortium (WI)

Monkey Mind

Lending period	7 days
Checked out	1/28/2014
Downloaded	1/28/2014
Downloads remaining	3
Status	Active
Format	OverDrive MP3 Audiobook