

How to Find Fiscal Year Circulation from Your OverDrive Account

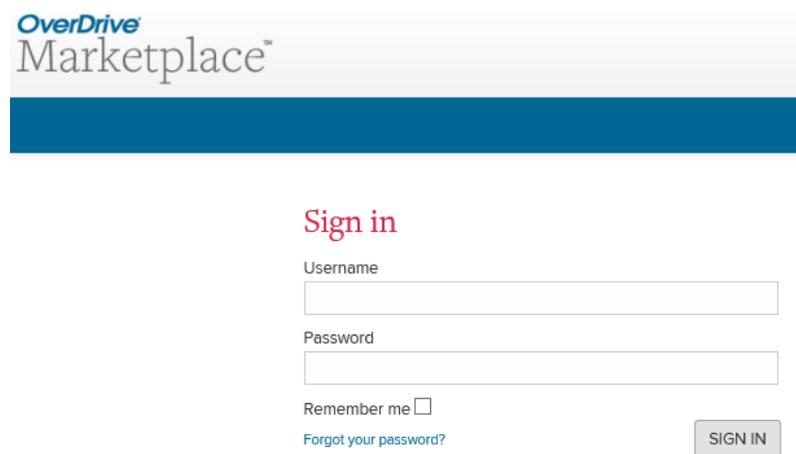
The Bibliostat Collect survey asks for Adult and Children’s circulation numbers for downloadable materials from OverDrive. We will **prefill these numbers** for your library; these numbers include Advantage copy circulations.

If you would like to run the reports for your own use, there are two methods we suggest for determining the Adult and Children’s numbers. The first method described below is probably easiest for a single library to use. The second method, which we use when pulling statistics for all branches at once, requires running three separate reports. All of these reports include Advantage copy circulations.

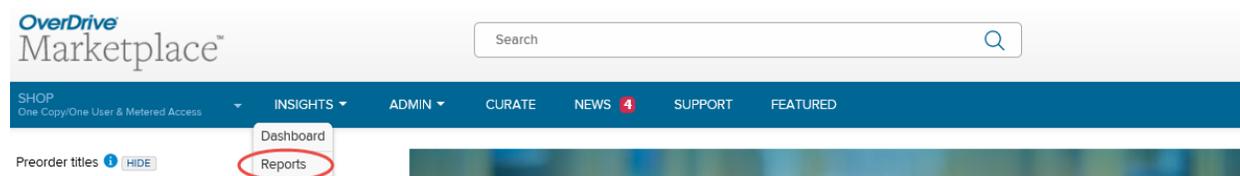
NOTE: Some checkouts do not appear immediately in the Circulations reports, so the circulation number for a time period that ended the day before a report is run may show 1,000 checkouts but a report for the same time period run one week later may show 1,005 checkouts.

Method One—requires Excel or similar program.

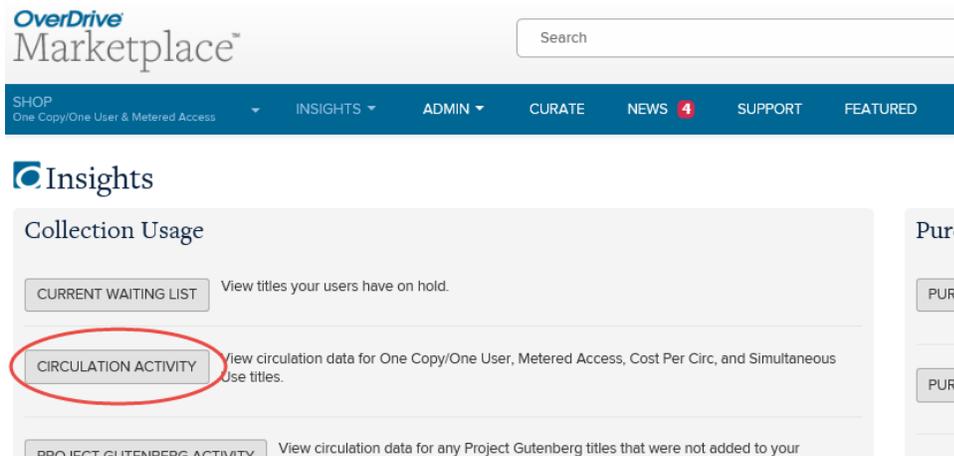
1. Log into your OverDrive Marketplace account at <http://marketplace.overdrive.com> (Contact Susan Knisely or Devra Dragos if you cannot locate your username. If you have your username but cannot remember your password, then click on “Forgot your password?” on the Marketplace login screen.)



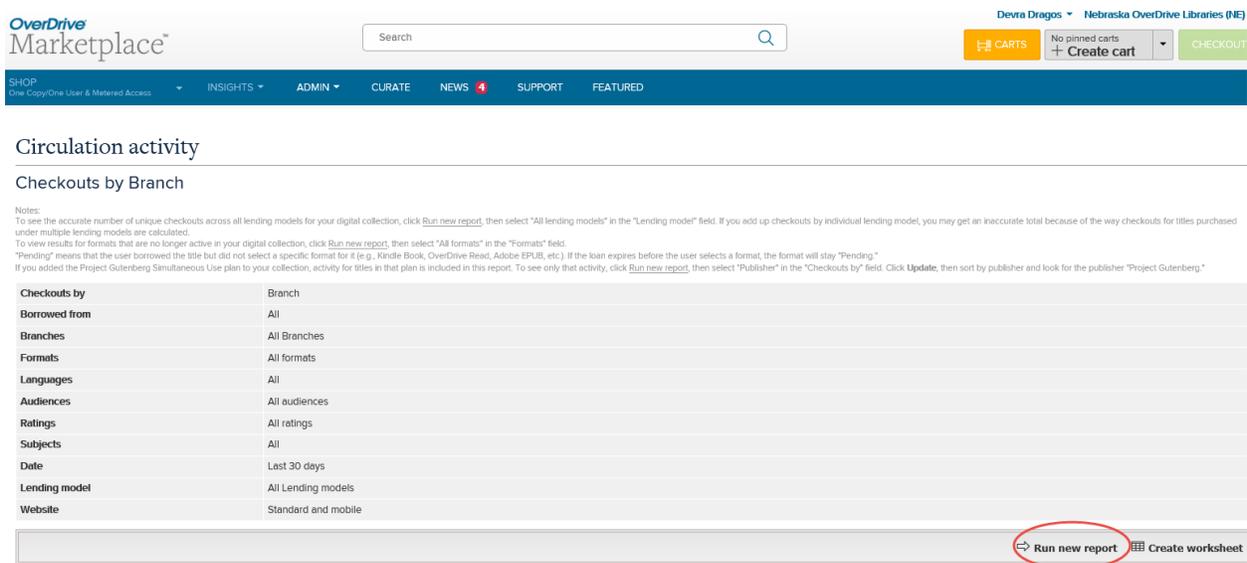
2. Click on the “Insights” tab for the dropdown menu, then click on “Reports”.



3. On the Reports page, click on the “Circulation Activity” button.



4. The system will automatically run a report with the options that you last used for this report; click on the “Run new report” button to change them as instructed below.



5. In the Report Options dialog box, use the dropdown menus to set the following parameters:

- “Checkouts by” should be Branch
- choose your library under “Branch”
- set the “Period Type” as Specific
- enter the “Start Date” and “End Date” with the dates of your library’s fiscal year
- all other fields should be as shown below

Note: To clear any fields in the dialog box where multiple options may be chosen, click the X at the end of the field or in the dropdown menu click a highlighted line to deselect it.

Report options ✕

Checkouts by:	Branch
Borrowed from:	All
Branch:	Alice M. Farr Library
Formats:	All formats
Language:	All
Audience:	All audiences
Rating:	All ratings
Subject:	All
Period Type:	Specific
Start Date:	10/01/2015
End Date:	09/30/2016
Lending model:	All Lending models
Website:	Standard and mobile
Creator:	
Purchase Order ID:	

6. Click the “Update” button.

7. Click on the highlighted library name or the number in the “Checkouts” column to retrieve the list of individual checkouts.

Circulation activity

Checkouts by Branch

Notes:
 To see the accurate number of unique checkouts across all lending models for your digital collection, click [Run new report](#), then select “All lending models” in the “Lending model” field. If you add up checkouts by individual lending model, you may get an inaccurate total because of the way checkouts for titles purchased under multiple lending models are calculated.
 To view results for formats that are no longer active in your digital collection, click [Run new report](#), then select “All formats” in the “Formats” field.
 “Pending” means that the user borrowed the title but did not select a specific format for it (e.g., Kindle Book, OverDrive Read, Adobe EPUB, etc.). If the loan expires before the user selects a format, the format will stay “Pending.”
 If you added the Project Gutenberg Simultaneous Use plan to your collection, activity for titles in that plan is included in this report. To see only that activity, click [Run new report](#), then select “Publisher” in the “Checkouts by” field. Click [Update](#), then sort by publisher and look for the publisher “Project Gutenberg.”

Checkouts by	Branch
Borrowed from	All
Branches	Alice M. Farr Library
Formats	All formats
Languages	All
Audiences	All audiences
Ratings	All ratings
Subjects	All
Date	10/1/2015 to 9/30/2016
Lending model	All Lending models
Website	Standard and mobile

↶ Run new report
📄 Create worksheet

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Displaying 1 - 1 of 1

Branch (1)	Checkouts (5,117)	Checkouts (chart)
Alice M. Farr Library	5,117	

Notes:

8. Click the “Create worksheet” button. This will create a CSV (comma separated value) file that you can open in Excel or other spreadsheet program.

The screenshot shows a report interface with a table of circulation data. The 'Create worksheet' button is circled in red. The table has the following columns: Details, Title, Edition, Creator, Language, Audience/..., Subject, Format, Publisher, Date Add..., Own, Lic. purch..., Lic. left, Lic. used, Checkout..., Checked..., Lending p..., Borrowed..., Bought by, Renewal, and Barcode.

Details	Title	Edition	Creator	Language	Audience/...	Subject	Format	Publisher	Date Add...	Own	Lic. purch...	Lic. left	Lic. used	Checkout...	Checked...	Lending p...	Borrowed...	Bought by	Renewal	Barcode
1	1, 2, 3 Qu...		Ellen Luck...	English	Adult Non...	Crafts, No...		Chronide...	10/03/2014	1	-	-	-	275-7941...	11/18/2015	14	Main colle...	Cons.	No	P2833
2	3 Truths a...		Lisa Gard...	English	Adult FICT...	Fiction, M...		Penguin G...	01/13/2016	3	-	-	-	275-7412...	02/27/2016	14	Main colle...	Cons.	No	P696
3	3 Truths a...		Lisa Gard...	English	Adult FICT...	Fiction, M...		Penguin G...	01/13/2016	3	-	-	-	275-8000...	03/13/2016	21	Main colle...	Cons.	No	P728

9. Depending on the browser you are using, the report may be downloaded to a pre-determined folder or you may have the option to “Open” the file as is the case below.

The screenshot shows the same report interface as above, but with a dialog box open over the table. The dialog box asks: "Do you want to open or save Circulation activity.csv from marketplace.overdrive.com?". It has three buttons: "Open", "Save", and "Cancel". The "Open" button is circled in red.

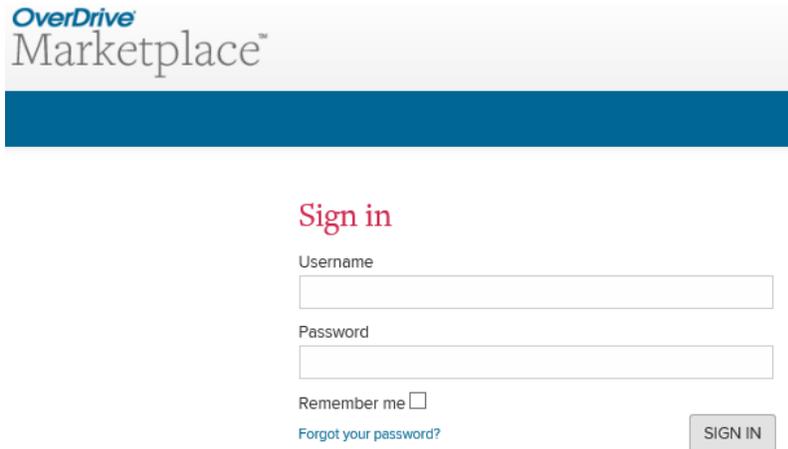
10. After opening the spreadsheet, sort by the “Audience/Rating” column. You will notice that a few records might not have an assigned Audience level—you will need to determine whether it is an Adult item or a Children’s item and enter that in the Audience/Rating column.

11. After each circulation has been assigned an Audience and sorted properly, count the rows of Adult Fiction and Adult Nonfiction items for the Adult circulation number and the number rows of Juvenile Fiction, Juvenile Nonfiction, Young Adult Fiction, and Young Adult Nonfiction for the Children’s circulation number.

NOTE: In earlier years the Subject Headings of Juvenile Fiction, Juvenile Literature, and Juvenile Nonfiction were used to calculate the number of Children’s circulation. That was because many titles had been assigned both Juvenile and Young Adult subject headings and would have been double-counted. Titles can only be assigned one Audience, so we now include Young Adult headings in the Children’s numbers.

Method Two

1. Log into your OverDrive Marketplace account at <http://marketplace.overdrive.com> (Contact Susan Knisely or Devra Dragos if you cannot locate your user ID. If you have your user ID but cannot remember your password, then click on “Forgot your password?” on the Marketplace login screen.)

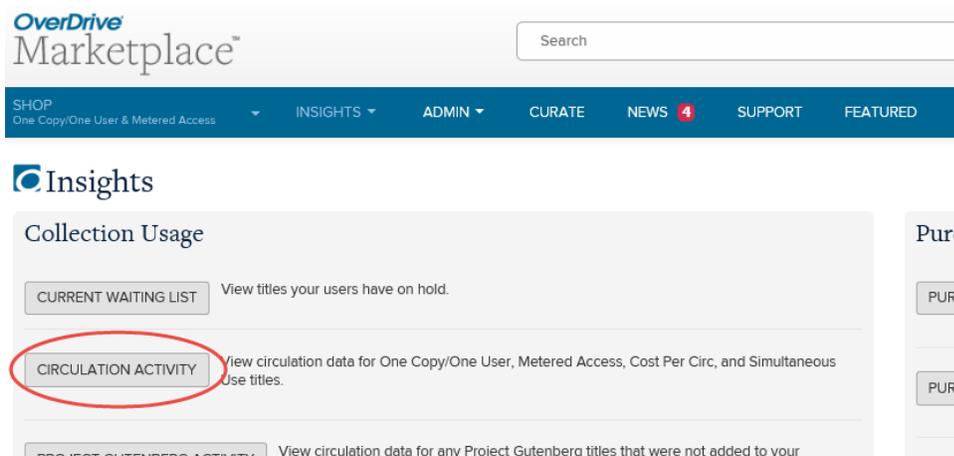


The image shows the login page for OverDrive Marketplace. At the top left is the logo "OverDrive Marketplace". Below it is a blue horizontal bar. The main heading "Sign in" is in red. There are two input fields: "Username" and "Password". Below the password field is a "Remember me" checkbox and a link "Forgot your password?". A "SIGN IN" button is located to the right of the password field.

2. Click on the “Insights” tab for the dropdown menu, then click on “Reports”.



3. On the Reports page, click on the “Circulation Activity” button.



4. The system will automatically run a report with the options that you last used for this report; click on the “Run new report” button to change them as instructed below.

OverDrive Marketplace

Devra Dragos ▾ Nebraska OverDrive Libraries (NE)

Search

CARTS No pinned carts + Create cart CHECKOUT

SHOP One Copy/One User & Metered Access INSIGHTS ADMIN CURATE NEWS 4 SUPPORT FEATURED

Circulation activity

Checkouts by Branch

Notes:
 To see the accurate number of unique checkouts across all lending models for your digital collection, click [Run new report](#), then select "All lending models" in the "Lending model" field. If you add up checkouts by individual lending model, you may get an inaccurate total because of the way checkouts for titles purchased under multiple lending models are calculated.
 To view results for formats that are no longer active in your digital collection, click [Run new report](#), then select "All formats" in the "Formats" field.
 "Pending" means that the user borrowed the title but did not select a specific format for it (e.g., Kindle Book, OverDrive Read, Adobe EPUB, etc.). If the loan expires before the user selects a format, the format will stay "Pending."
 If you added the Project Gutenberg Simultaneous Use plan to your collection, activity for titles in that plan is included in this report. To see only that activity, click [Run new report](#), then select "Publisher" in the "Checkouts by" field. Click [Update](#), then sort by publisher and look for the publisher "Project Gutenberg."

Checkouts by	Branch
Borrowed from	All
Branches	All Branches
Formats	All formats
Languages	All
Audiences	All audiences
Ratings	All ratings
Subjects	All
Date	Last 30 days
Lending model	All Lending models
Website	Standard and mobile

Run new report Create worksheet

5. The first report is for Adult statistics. For your library, use the dropdown menus for the following parameters:

- “Checkouts by” should be Branch
- choose your library under “Branch”
- limit by “Audience” as shown
- set the “Period Type” as Specific
- enter the “Start Date” and “End Date” with the dates of your library’s fiscal year (or other time period desired)
- all other fields should be as shown

Report options [X]

Checkouts by: Branch [v]

Borrowed from: All [v]

Branch: Alice M. Farr Library [v]

Formats: All formats [v]

Language: All [v]

Audience: Adult Fiction, Adult Nonfiction [v]

Rating: All ratings [v]

Subject: All [v]

Period Type: Specific [v]

Start Date: 10/01/2015 [C]

End Date: 09/30/2016 [X] [C]

Lending model: All Lending models [v]

Website: Standard and mobile [v]

Creator: []

Purchase Order ID: []

Update Cancel

6. Click the “Update” button.

7. Note the number of Checkouts.

Circulation activity

Checkouts by Branch

Notes:

To see the accurate number of unique checkouts across all lending models for your digital collection, click [Run new report](#), then under multiple lending models are calculated.

To view results for formats that are no longer active in your digital collection, click [Run new report](#), then select “All formats” in the “Pending” means that the user borrowed the title but did not select a specific format for it (e.g., Kindle Book, OverDrive Read, etc.). If you added the Project Gutenberg Simultaneous Use plan to your collection, activity for titles in that plan is included in this report.

Checkouts by	Branch
Borrowed from	All
Branches	Alice M. Farr Library
Formats	All formats
Languages	All
Audiences	Adult Fiction, Adult Nonfiction
Ratings	All ratings
Subjects	All
Date	10/1/2015 to 9/30/2016
Lending model	All Lending models
Website	Standard and mobile

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Branch (1)	Checkouts (4,178) ▾	Checkouts (chart)
1 Alice M. Farr Library	4,178	

8. Click the “Run new report” button again and change the “Audience” field for the Children’s statistics, choosing all the Juvenile and Young Adult options as shown, and click the “Update” button.

Report options

Checkouts by: Branch

Borrowed from: All

Branch: Alice M. Farr Library

Formats: All formats

Language: All

Audience: Juvenile Fiction, Juvenile Nonfiction

Rating: Adult Fiction

Subject: Adult Nonfiction

Period Type: Juvenile Fiction

Start Date: Juvenile Nonfiction

End Date: Young Adult Fiction

Lending model: All Lending models

Website: Standard and mobile

Creator:

Purchase Order ID:

Update Cancel

9. Note the number of Checkouts.

Circulation activity

Checkouts by Branch

Notes:

To see the accurate number of unique checkouts across all lending models for your digital collection, click [Run new report](#), then select "All lending models" in the "Lending model" field.

To view results for formats that are no longer active in your digital collection, click [Run new report](#), then select "All formats" in the "Formats" field.

"Pending" means that the user borrowed the title but did not select a specific format for it (e.g., Kindle Book, OverDrive Read, Adobe EPUB, etc.). If the loan expires before the user selects a format, the loan is included in this report. To see only that activity, click [Run new report](#).

Checkouts by	Branch
Borrowed from	All
Branches	Alice M. Farr Library
Formats	All formats
Languages	All
Audiences	Juvenile Fiction, Juvenile Nonfiction, Young Adult Fiction, Young Adult Nonfiction
Ratings	All ratings
Subjects	All
Date	10/1/2015 to 9/30/2016
Lending model	All Lending models
Website	Standard and mobile

Page 1 of 1 50		
Branch (1)	Checkouts (934)	Checkouts (chart)
1 Alice M. Farr Library	934	

10. Click the "Run new report" one more time and clear the "Audience" field to get all the circulations combined.

Report options

Checkouts by: Branch

Borrowed from: All

Branch: Alice M. Farr Library

Formats: All formats

Language: All

Audience: All audiences

Rating: All ratings

Subject: All

Period Type: Specific

Start Date: 10/01/2015

End Date: 09/30/2016

Lending model: All Lending models

Website: Standard and mobile

Creator:

Purchase Order ID:

Update Cancel

11. Add the numbers from the Adult and Children’s reports and compare that sum to the total number of Checkouts shown in this report. If the numbers are equal, you are done. If the combined number is less than that shown in the report, as is the case here, click on the library name or the number in the “Checkouts” column to retrieve the listing of each checkout.

Circulation activity

Checkouts by Branch

Notes:
 To see the accurate number of unique checkouts across all lending models for your digital collection, click [Run new report](#), then select “All lending models” in the “Lending model” field. If you add up checkouts by individual lending model, you may get an inaccurate total because of the way checkouts for titles purchased under multiple lending models are calculated.
 To view results for formats that are no longer active in your digital collection, click [Run new report](#), then select “All formats” in the “Formats” field.
 “Pending” means that the user borrowed the title but did not select a specific format for it (e.g., Kindle Book, OverDrive Read, Adobe EPUB, etc.). If the loan expires before the user selects a format, the format will stay “Pending.”
 If you added the Project Gutenberg Simultaneous Use plan to your collection, activity for titles in that plan is included in this report. To see only that activity, click [Run new report](#), then select “Publisher” in the “Checkouts by” field. Click [Update](#), then sort by publisher and look for the publisher “Project Gutenberg.”

Checkouts by	Branch
Borrowed from	All
Branches	Alice M. Farr Library
Formats	All formats
Languages	All
Audiences	All audiences
Ratings	All ratings
Subjects	All
Date	10/1/2015 to 9/30/2016
Lending model	All Lending models
Website	Standard and mobile

Run new report Create worksheet

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Branch (1) Checkouts (5,117) Checkouts (chart) Displaying 1 - 1 of 1

Alice M. Farr Library	5,117
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Notes:

12. Click on the “Audience/Rating” column to sort it alphabetically.

Run new report Create worksheet

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Details	Title	Edition	Creator	Language	Audience/Rating	Subject	Format	Publisher	Date Add.	Own	Lic. purch.	Lic. left	Lic. used	Checkout...	Checked...	Lending p...	Borrowed...	Bought by	Renewal	Barcode
1	1, 2, 3 Qu...		Ellen Luck...	English	Adult Non...	Crafts, No...	☐	Chronicle...	10/03/2014	1	-	-	-	275-7941...	11/18/2015	14	Main colle...	Cons.	No	P2833
2	3 Truths a...		Lisa Gard...	English	Adult Ficti...	Fiction, M...	☐	Penguin G...	01/13/2016	3	-	-	-	275-7412...	02/27/2016	14	Main colle...	Cons.	No	P696
3	3 Truths a...		Lisa Gard...	English	Adult Ficti...	Fiction, M...	☐	Penguin G...	01/13/2016	3	-	-	-	275-8000...	03/13/2016	21	Main colle...	Cons.	No	P728

13. Titles that have not been assigned an Audience heading will show at the top of the list. (There are about 100 in the collection.) If you see the heading of Young Adult ... at the top of the list, click Audience/Rating again to reverse the order.

Run new report Create worksheet

Page 1 of 103 50 Displaying 1 - 50 of 5117

Details	Title	Edition	Creator	Language	Audience/Rating	Subject	Format	Publisher	Date Add.	Own	Lic. purch.	Lic. left	Lic. used	Checkout...	Checked...	Lending p...	Borrowed...	Bought by	Renewal	Barcode
1	Grub Line...						☐	Dorcheste...	08/22/2012	1	-	-	-	275-1191...	02/23/2016	14	Main colle...	Cons.	No	P7613
2	Toys Meet...		Emily Jen...	English		Humor (Fi...	☐	Random...	09/29/2015	1	-	-	-	275-1139...	02/02/2016	14	Main colle...	Cons.	No	P1962
3	The Myst...		Charles Di...	English		Free Class...	☐	Project G...	01/01/2000	Sim. Use	-	-	-	275-9385...	08/28/2016	14	Main colle...	Cons.	No	P7182
4	The Phant...		Rudyard...	English		Free Class...	☐	Project G...	01/01/2000	Sim. Use	-	-	-	275-9385...	08/28/2016	14	Main colle...	Cons.	No	P7182
5	Richard III		William S...	English		Free Class...	☐	Project G...	01/01/2000	Sim. Use	-	-	-	275-1074...	01/13/2016	21	Main colle...	Cons.	No	P7437
6	3 Truths a...		Lisa Gard...	English	Adult Ficti...	Fiction, M...	☐	Penguin G...	01/13/2016	3	-	-	-	275-7412...	02/27/2016	14	Main colle...	Cons.	No	P696
7	3 Truths a...		Lisa Gard...	English	Adult Ficti...	Fiction, M...	☐	Penguin G...	01/13/2016	3	-	-	-	275-8000...	03/13/2016	21	Main colle...	Cons.	No	P728

14. You will need to determine the audience for each of these items. Click on the title to open the record to help you determine whether the title is part of the Adult collection or the Children’s collection.

15. Add unassigned checkouts to the appropriate number—Adult or Children’s—and you are done.