

How to Find Fiscal Year Circulation from Your OverDrive Account

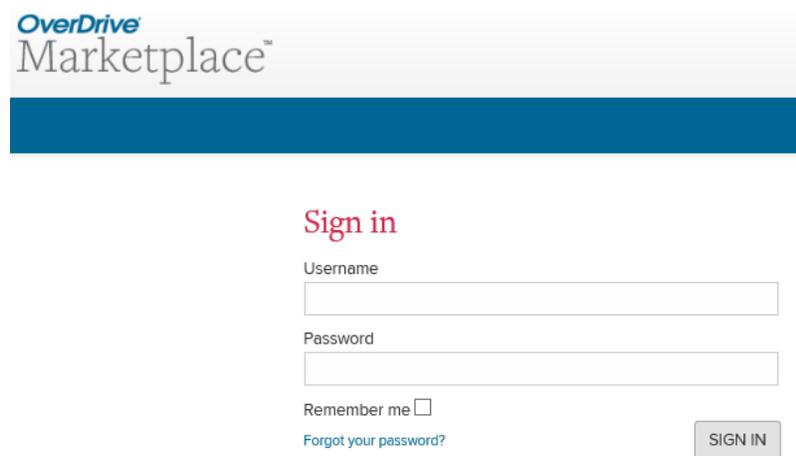
The Bibliostat Collect survey asks for Adult and Children’s circulation numbers for downloadable materials from OverDrive. We will **prefill these numbers** for your library; these numbers include Advantage copy circulations.

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.

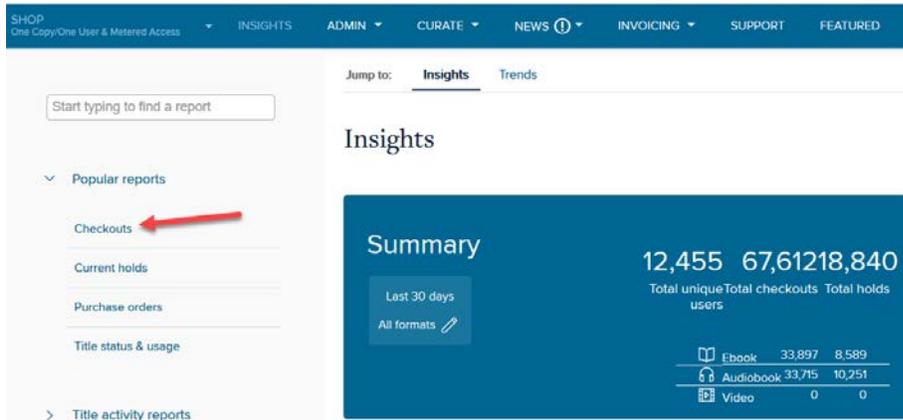
1. Log into your OverDrive Marketplace account at <http://marketplace.overdrive.com> (Contact Susan Knisely or Devra Dragos if you cannot locate your username. If you have your username but cannot remember your password, then click “Forgot your password?” on the Marketplace login screen.)



2. Click “Insights” on the blue toolbar.



3. Click “Checkout” under “Popular reports.”



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

Checkouts

To see important information about this report, [visit this help article](#).

Checkouts by Month

Checkouts by	Month
Borrowed from	All
Branches	Sioux County Library
Lucky Day	All checkouts
Formats	All formats
Languages	All
Audiences	All audiences
Ratings	All ratings
Subjects	All
Date	Last 1 years
Lending model	All lending models
Website	Standard and mobile

[Run new report](#) [Create worksheet](#)

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.

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.

Checkouts

To see important information about this report, visit this help article.

Checkouts by Branch

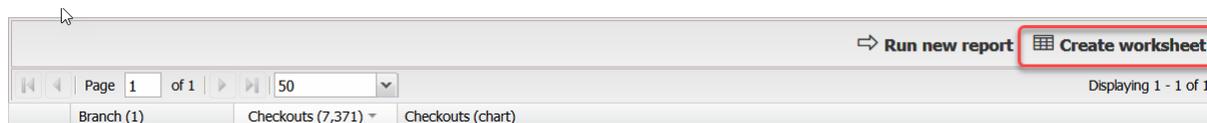
Checkouts by	Branch
Borrowed from	All
Branches	Alice M. Farr Library
Lucky Day	All checkouts
Formats	All formats
Languages	All
Audiences	All audiences
Ratings	All ratings
Subjects	All
Date	10/1/2018 to 9/30/2019
Lending model	All lending models
Website	Standard and mobile

Run new report Create worksheet

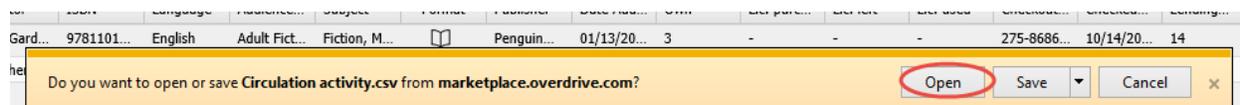
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Branch (1)	Checkouts (7,371)	Checkouts (chart)
1 Alice M. Farr Library	7,371	

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.



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.



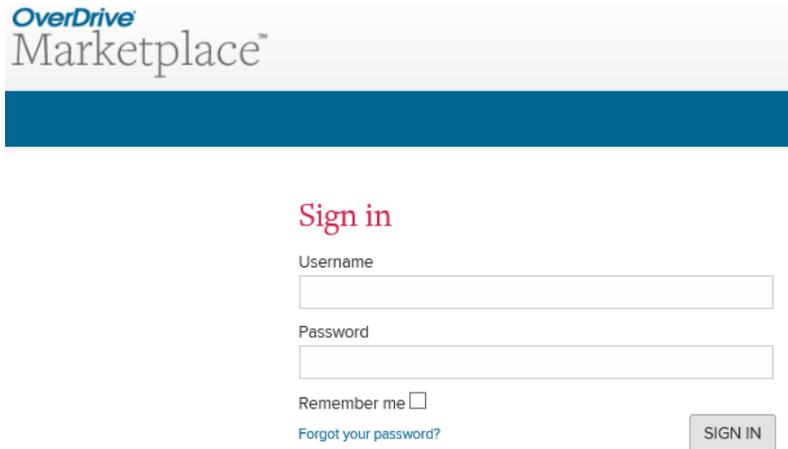
10. After opening the spreadsheet, sort by the “Audience/Rating” column. You will notice that a few records might not have an assigned Audience level—you will need to determine whether it is an Adult item or a Children’s item and enter that in the Audience/Rating column.

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

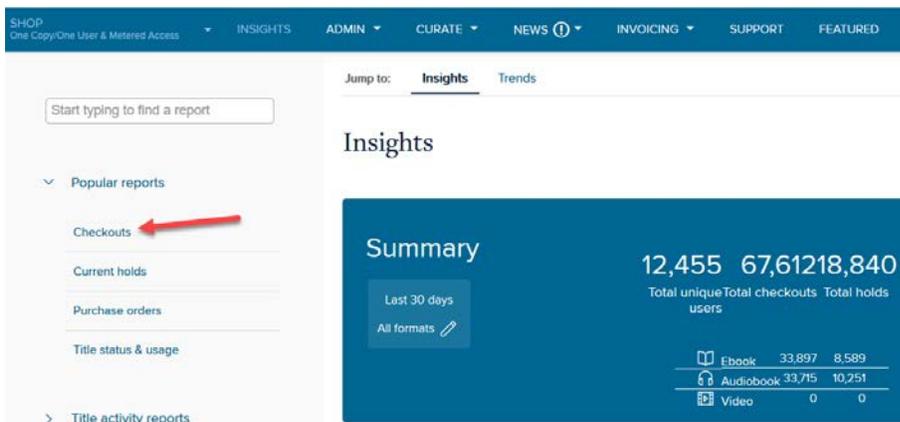


The image shows the OverDrive Marketplace login page. At the top left is the logo "OverDrive Marketplace". Below it is a blue horizontal bar. The main heading is "Sign in" in red. There are two input fields: "Username" and "Password". Below the password field is a "Remember me" checkbox and a link "Forgot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

2. Click “Insights” on the blue toolbar.



3. Click “Checkout” under “Popular reports.”



The image shows the "Insights" page. At the top is a blue navigation bar with the same menu items as the previous image. Below the navigation bar is a search bar with the text "Start typing to find a report". To the left is a sidebar with a "Popular reports" section containing "Checkouts", "Current holds", "Purchase orders", and "Title status & usage". A red arrow points to the "Checkouts" link. To the right of the sidebar is the main content area, which has a "Summary" section. The "Summary" section displays the following data:

	Total unique users	Total checkouts	Total holds
Ebook	33,897	67,612	18,589
Audiobook	33,715	10,251	
Video	0	0	

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

Checkouts

To see important information about this report, [visit this help article](#).

Checkouts by Month

Checkouts by	Month
Borrowed from	All
Branches	Sioux County Library
Lucky Day	All checkouts
Formats	All formats
Languages	All
Audiences	All audiences
Ratings	All ratings
Subjects	All
Date	Last 1 years
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

Checkouts by: Branch

Borrowed from: All

Branch: Alice M. Farr Library

Lucky Day: All checkouts

Formats: All formats

Language: All

Audience: Adult Fiction, Adult Nonfiction

Rating: All ratings

Subject: All

Period Type: Specific

Start Date: 10/01/2018

End Date: 09/30/2019

Lending model: All lending models

Website: Standard and mobile

Creator:

Purchase Order ID:

Update Cancel

6. Click the “Update” button.

7. Note the number of Checkouts.

Checkouts by Branch

Checkouts by	Branch
Borrowed from	All
Branches	Alice M. Farr Library
Lucky Day	All checkouts
Formats	All formats
Languages	All
Audiences	Adult Fiction, Adult Nonfiction
Ratings	All ratings
Subjects	All
Date	10/1/2018 to 9/30/2019
Lending model	All lending models
Website	Standard and mobile

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Branch (1)	Checkouts (6,253)	Checkouts (chart)
1 Alice M. Farr Library	6,253	

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		Report options	
Checkouts by:	Branch	Checkouts by:	Branch
Borrowed from:	All	Borrowed from:	All
Branch:	All branches Agnes Robinson Waterloo Public Library Answorth Public Library Albion Public Library Alice M. Farr Library Alliance Public Library Arapahoe Public Library Arlington Public Library Arthur County Library	Branch:	All branches Agnes Robinson Waterloo Public Library Answorth Public Library Albion Public Library Alice M. Farr Library Alliance Public Library Arapahoe Public Library Arlington Public Library Arthur County Library
Lucky Day:	All checkouts	Lucky Day:	All checkouts
Formats:	All formats	Formats:	All formats
Language:	All	Language:	All
Audience:	Juvenile Fiction, Juvenile Nonfiction, Young .	Audience:	Juvenile Fiction, Juvenile Nonfiction, Young .
Rating:	Adult Fiction	Rating:	All ratings
Subject:	Adult Nonfiction Juvenile Fiction	Subject:	All
Period Type:	Juvenile Nonfiction	Period Type:	Specific
Start Date:	Young Adult Fiction	Start Date:	10/01/2018
End Date:	Young Adult Nonfiction	End Date:	09/30/2019
Lending model:	All lending models	Lending model:	All lending models
Website:	Standard and mobile	Website:	Standard and mobile
Creator:		Creator:	
Purchase Order ID:		Purchase Order ID:	
Update Cancel		Update Cancel	

9. Note the number of Checkouts.

Checkouts by	Branch
Borrowed from	All
Branches	Alice M. Farr Library
Lucky Day	All checkouts
Formats	All formats
Languages	All
Audiences	Juvenile Fiction, Juvenile Nonfiction, Young
Ratings	All ratings
Subjects	All
Date	10/1/2018 to 9/30/2019
Lending model	All lending models
Website	Standard and mobile

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Branch (1)	Checkouts (1,115)	Checkouts (chart)	
1 Alice M. Farr Library	1,115		

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:	<div style="border: 1px solid gray; padding: 2px;"> All branches <ul style="list-style-type: none"> Agnes Robinson Waterloo Public Library Answorth Public Library Abion Public Library <li style="background-color: #e0e0e0;">Alice M. Farr Library Alliance Public Library Arapahoe Public Library Arlington Public Library Arthur County Library </div>
Lucky Day:	All checkouts
Formats:	All formats
Language:	All
Audience:	All audiences
Rating:	All ratings
Subject:	All
Period Type:	Specific
Start Date:	10/01/2018
End Date:	09/30/2019
Lending model:	All lending models
Website:	Standard and mobile
Creator:	
Purchase Order ID:	

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.

Checkouts by	Branch
Borrowed from	All
Branches	Alice M. Farr Library
Lucky Day	All checkouts
Formats	All formats
Languages	All
Audiences	All audiences
Ratings	All ratings
Subjects	All
Date	10/1/2018 to 9/30/2019
Lending model	All lending models
Website	Standard and mobile

Page 1 of 1 50		
Branch (1)	Checkouts (7,371)	Checkouts (chart)
1 Alice M. Farr Library	7,371	

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

Run new report																		
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	Det...	Titl...	Edit...	Cre...	ISBN	Lan...	Audience/R...	Su...	For...	Pu...	Dat...	Own	Lic...	Lic...	Lic...	Ch...	Ch...	Len...
1		#1 ...		Ja...	978...	Eng...	Adult Fiction	Ficti...		Hac...	03/...	1	-	-	-	275...	2/7...	21
2		3 J...	Una...	Lee...	978...	Eng...	Adult Fiction	Ficti...		Boo...		0	-	-	-	275...	1/2...	14
3		The...		Gar...	978...	Eng...	Adult Nonfi...	Fa...		Mo...	08/...	1	-	-	-	275...	6/2...	14

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																		
Page 1 of 148 50																		
	Det...	Title	Edit...	Cre...	ISBN	Lan...	Audience/R...	Su...	For...	Pu...	Dat...	Own	Lic...	Lic...	Lic...	Ch...	Ch...	Len...
1		Five...		Mar...		Eng...				Pro...	01/...	Sim...	-	-	-	275...	4/2...	14
2		The...		Edg...		Eng...				Pro...	01/...	Sim...	-	-	-	275...	8/6...	21
3		The...		Geo...		Eng...				Pro...	01/...	Sim...	-	-	-	275...	10/...	14
4		#1 ...		Ja...	978...	Eng...	Adult Fiction	Ficti...		Hac...	03/...	1	-	-	-	275...	2/7...	21

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.