

# Running Wait List Reports For the Consortium and Member Libraries OverDrive<sup>1</sup>

## The Consortium-Level Wait List Report

*Important Note:* This report will generate wait-list data for the consortium as a whole.

### Running the Wait List Report

1. Login to **MarketPlace** (at the consortium level).
2. In the top menu, click **Insights**, and then click **Reports**.
3. Under Collection Usage, click **Current Waiting List**.
4. In the top right of the chart, click **Run New Report**. A pop-up window will open.
  - a. For Branch, ensure that **All Branches** is loaded. If not, place your cursor in the Branch **drop-down window**; click on the **x**, and click **outside the box**. All Branches will then load.
  - b. For Website, click the **drop-down arrow**, and select **Standard and Mobile**.
  - c. Click **Update**.
5. In the top right of the chart, click **Create Worksheet**. A pop-up window will open.
6. To save, click the **drop-down arrow**; click **Save As**, and save the Worksheet to a **desirable location**.

### Manipulating the Wait List Online

1. To view the titles with the highest holds, place your cursor on the **All Holds column heading**; click the **downward arrow**, and select **Sort Descending**. Allow the chart to refresh.
2. To view the number of holds for a given title by the member libraries, click the **number** in the Branches column (on the far right).
3. To view the patrons (email address and bar code) on hold, click on the **number** of patrons in the All Holds column.

**Key Data from the Wait List Report – all data pertain to the consortium as a whole**

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<sup>1</sup> Revised December 15, 2015

6. To save, click the **drop-down arrow**; click **Save As**, and save the Worksheet to a **desirable location**.

### Manipulating the Wait List Online

1. To view the titles with the highest holds, place your cursor on the **All Holds column heading**; click the **downward arrow**, and select **Sort Descending**. Allow the chart to refresh.
2. To view the patrons (email address and bar code) on hold, click on the **number** of patrons in the All Holds column.

### Key Data from the Wait List Report

**Note** – the most important item in this report is **All Holds**. This shows you which titles your patrons have on hold, and these are the titles that you should focus your purchasing activity.

- **Users on Wait List by Format:** shows the number of users on the wait list by total and by ebook, audiobook, and video formats.
- **Average Wait Period:** the number of days required to fill a single hold.
- **All Holds:** the number of holds placed by your library patrons on a consortium title; this does not include holds placed on an advantage title.
- **Advantage Holds:** Ignore this column in this report.
- **Consortium Ratio:** Ignore this column in this report.
- **Advantage Ratio:** Ignore this column in this report.