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](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 on the “Insights” tab for the dropdown menu, then click on “Reports”.

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**Sign in**

Username

Password

Remember me

Forgot your password?  SIGN IN
3. On the Reports page, click on the “Circulation Activity” button.

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.

5. In the Report Options dialog box, use the dropdown menus to set the following parameters:
   a. “Checkouts by” should be Branch
   b. choose your library under “Branch”
   c. set the “Period Type” as Specific
   d. enter the “Start Date” and “End Date” with the dates of your library’s fiscal year
   e. 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.

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 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.)

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 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.

5. The first report is for Adult statistics. For your library, use the dropdown menus for the following parameters:
   a. “Checkouts by” should be Branch
   b. choose your library under “Branch”
   c. limit by “Audience” as shown
   d. set the “Period Type” as Specific
   e. enter the “Start Date” and “End Date” with the dates of your library’s fiscal year (or other time period desired)
   f. all other fields should be as shown
6. Click the “Update” button.

7. Note the number of Checkouts.

Checkouts by Branch

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.
9. Note the number of Checkouts.

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

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

**Checkouts by Branch**

<table>
<thead>
<tr>
<th>Checkouts by Branch</th>
<th>Branch</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrowed from</td>
<td>All</td>
</tr>
<tr>
<td>Languages</td>
<td>All</td>
</tr>
<tr>
<td>Audiences</td>
<td>All audiences</td>
</tr>
<tr>
<td>Ratings</td>
<td>All ratings</td>
</tr>
<tr>
<td>Subjects</td>
<td>All</td>
</tr>
</tbody>
</table>

| Date | 5/1/2017 to 5/31/2018 |
| Lending model | All lending models |
| Website | Standard and mobile |

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

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.

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.