Bud Werner Approach to Advantage Plus Sharing

Collection Plan

- Set everything to no - aka, I'm sharing it all with no limits except to not show unpublished titles.
- Opted to manage this title by title - not automatically.

First Time Setup

- Clicked through to every title
- Shared everything except weeded and not for sale titles.
  - 735 titles on the list 729 were shared with the consortia
  - Excluded 6 due them having been weeded or no longer available for sale
  - Immediately filled 151 non-Bud Werner holds.
- If a title had been weeded, I made sure the same title was available in the collective and then excluded it from sharing

- If a title could no longer be purchased, I made sure the same title was available in the collective, then asked Overdrive to weed it from my advantage collection. Once weeded I then excluded it from sharing.

Management Plan

Opt to run the **Advantage Plus > Review Titles** list weekly and share all purchased titles with the consortium as per the following

1. For individual hold requests, I will wait until the patron requesting the item has a chance to grab it first before sharing with the consortium.
2. For visiting authors and Literary Sojourn, I will wait a week after announcing the programing before sharing with the consortium
3. All new additions to the collection will now be purchased exclusively through Advantage, and all new titles will be shared with the consortium a week after purchasing.
4. Will continue to automatically buy additional titles at a hold ratio of 3 holds to one copy for Bud Werner patrons. These are purchased via our Holds Manager settings and I'll share them weekly.
5. Will run weekly reports on expired titles both in the collective and advantage with Bud Werner holds, purchase these titles, and in 1 week release them to the consortium.

Overdrive Issues - for Nicole

1. If I have more than one copy of a title I don't see a way to keep one in Advantage and share the others. Is this possible?
2. How long does it take for newly purchased titles to show up in the sharing interface? Looks like immediately.
3. I have a ticket into Overdrive outlining that my automatic hold fulfillment plans are not buying additional copies as they should - not sure if this is an issue related to flipping the Advantage Share switch.
4. It would be nice if the Advantage Plus interface told you which titles were weeded since the consortium would not want us to share these with them.
5. On the Title Stats and Usage worksheet, if I run a report in Advantage and limit those items to our Advantage copies, the spreadsheet is not accurately reporting ownership numbers or the Advantage Shared numbers. See detailed problem
6. Experiencing issues with the Circulation reports: See detailed problem
7. In the Advantage Plus interface all titles on the spreadsheet are listed as Not for Sale, but that was not true, only 3 out of 753 were not for sale

	Available for sale	Unit pric
er Me...	No	$0.00
er Me...	No	$0.00
er Me...	No	$0.00

Overdrive Reporting - Nicole

These are the type of reports I would want to get from Overdrive.

1. Number of Advantage Titles Purchased each year - currently there is an issue with the accuracy of this report
2. List and number of Advantage Titles shared with the consortium - currently there is an issue with the accuracy of this report
3. Circulation of Advantage titles by Bud Patrons - this works fine
4. Circulation of Advantage titles by consortium members - this worked, but not the way I would expect it.
5. Circulation of all collections by Bud Patrons - this works fine

Pika Issues - Marmot

1. Our scope of the catalog looks fine. The title Home Fire is showing the correct number of copies for the audiobook and eBook = 2 each

Home fire: A Novel

2. But the Marmot Global Scope is not

Home fire: A Novel

3. A search of the title An American Marriage shows both Bud Werner and Marmot numbers being off. There should be 2 audiobooks and 8 eBooks. The audiobook number is correct, but the eBook number shows 6.
4. Titles that only Bud Werner owned are showing up in Marmot global see Everything in this County Must