OverDrive®
Content Reserve

Community Reserve

How to add 'Local Content' to Content Reserve and share it with libraries worldwide via OverDrive's Community Reserve

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Local Content

Introduction to Local Content

Overview: What is Local Content?

Local Content allows libraries to offer local digitized collections of documents, audio materials, and video titles in popular digital formats.

To participate, libraries upload materials via OverDrive's Content Reserve to their existing collection, enter information about the material, and secure it with OverDrive's exclusive digital rights management utility.

Once materials are cataloged and uploaded, they become available for download by patrons from the library's OverDrive site.

What kind of materials can be published as Local Content?

Local Content makes it simple for libraries to publish and share historical documents, photographs, community materials, self-authored texts, and even locally produced audio and video materials.

How are other libraries using Local Content?

Here are a few examples of Local Content published by other libraries:

Adobe eBooks

Federal Art in Cleveland (Cleveland Public Library)

Greetings from Tucson (Pima County Public Library)

Audio

Podcasts (National Association of Realtors)

Til You're Gone / The Blind King – Music CD (Boston Public Library)

Video

Student Voices: Teen Suicide (Denver Public Library)

The Judge's Daughter (Rochester Public Library)

An example of a Local Content title as displayed on a library's OverDrive-powered site. 'Til You're Gone' is a music CD contributed by Boston Public Library. The title was then 'shared' and made available to other public library partners through OverDrive's Community Reserve.

What Local Content formats does OverDrive support?

Supported formats for Local Content include:

- ▶ Adobe PDF eBook
- ▶ Open PDF eBook
- ▶ OverDrive MP3 Audiobook
- ▶ OverDrive WMA Audiobook
- ▶ OverDrive Music
- ▶ Video

Note: Protected EPUB eBooks are not supported at this time.

Each Local Content item will need to be 'optimized' or prepared in a format the library currently lends at their OverDrive site.

What is the charge for Local Content?

Your OverDrive Virtual Branch includes 10 GB of storage for Local Content items. Additional space may be added for an additional cost.

Bandwidth is limited to 500 GB per 12 months. There is a charge for the next 1 TB.

For more information

http://overdrive.com/Resources/PartnerServices/CollectionDevelopment/Communit yReserve.aspx

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Overview: Adding Local Content

Step 1: Secure ownership rights, licenses, and permissions

Your library must hold the necessary ownership rights, licenses, and / or permissions to upload the content into Community Reserve. If there are questions about rights to any media the item should not be uploaded.

When adding a title to Local Content, the library will be asked to confirm that all such rights are in place.

Step 2: Catalog metadata

1. Libraries enter metadata to Content Reserve.

2. Required fields include: Title, Sort Title, Creator Name, Creator Role, Publisher, Retail Info (Ready for Lending Date), Format Information (File Name and Software Version), Language(s), Geographic Rights, Subject 1 and Subject 2, Short Description, Ready For Lending Status.

3. The library selects copy protection (DRM) to apply to the title.

4. Adobe PDF eBook files can be uploaded by the library during this process.

Step 3: Submit files

1. **PDF eBooks:** Libraries upload Adobe or Open PDF eBook files during cataloging via Content Reserve.

2. **Audiobooks, Music, and Video:** Library can deliver files to OverDrive via FTP or mail by working with their OverDrive Account Specialist.

   Note: Metadata must be in place prior to sending files to OverDrive.

Step 4: Titles are added to your collection

Once Local Content is successfully cataloged and the files are uploaded, patrons may browse, check out, and download these titles via the library's OverDrive site.

Downloads are counted and tracked just like purchased titles.

Questions?

For more information on adding Local Content to your collection, please contact your library's Account Specialist at OverDrive.

How to Catalog Local Content

In this section you will learn how to catalog a title in Content Reserve.

IMPORTANT NOTES

PDF eBooks

▶ The library will enter metadata <u>and</u> upload files via Content Reserve (www.contentreserve.com).

▶ Only PDFs smaller than 50MB may be uploaded via Content Reserve. For files larger than 50MB, please post to your FTP location and alert your OverDrive Account Specialist.

▶ <u>PDF Supplements</u>: To create a PDF eBook paired with a PDF supplement, please …

1. Catalog and upload the primary PDF(s) only.
2. Send your OverDrive Account Specialist the file(s) and title(s) for the supplemental PDF(s). Request that the supplemental PDF(s) be paired with the primary title.
3. OverDrive will then create the supplemental record, and upload the supplemental file.

▶ EPUB Local Content is not supported at this time.

Audiobooks, Music, Video

▶ The library will enter metadata via Content Reserve (www.contentreserve.com).

Note: *OverDrive will take care of uploading files due to file size.*

▶ <u>Burn to CD permission</u>: Can be disabled as a user right on a title by title basis. Email your Account Specialist to request this.

Note: *This will be done after the files are uploaded by OverDrive.*

▶ <u>MP3 Audiobooks</u>: Create a catalog entry in Content Reserve for a WMA Audiobook and make it available for lending. OverDrive will then apply this metadata to the MP3 Audiobook.

▶ <u>MediaMarkers™</u>**:** OverDrive can add MediaMarkers to Audiobooks, Music, and Video. To add MediaMarkers, please provide the information below for the titles that you submit.

Disc#	Track#	Track Name	Timestamp
1	1	*[description]*	*[hh:mm:ss]*
	2	*[description]*	*[hh:mm:ss]*
	3	*[description]*	*[hh:mm:ss]*

1. Replace *[description]* with the track description.
2. Replace *[hh:mm:ss]* with the location of a MediaMarker in hours:minutes:seconds.
3. Provide this information for every track that needs a MediaMarker.

▶ <u>PDF Supplements</u>: To create a title paired with a PDF supplement, please …

1. Catalog the primary title only.
2. Send your OverDrive Account Specialist the files for both the primary and supplemental record(s), plus the title(s) for the supplemental PDF(s). Request that the supplemental PDF(s) be paired with the primary title(s).
3. OverDrive will then create the supplemental record(s), and upload the primary and supplemental file(s).

▶ <u>Send files</u>: After cataloging is complete in Content Reserve, files can be sent to your Account Specialist via FTP or mail.

1. Audiobook and music files should be sent to OverDrive as MP3 files or audio CDs. Video may be sent as MPG or WMV files, or as a DVD.

2. Metadata must be in place prior to sending files to OverDrive.

3. Your Account Specialist can provide the FTP login for OverDrive.

▶ Typical processing time is 4 to 6 weeks.

How to Add Metadata

1. Recommendation: Prepare the metadata for each title in advance in a spreadsheet.

   Required fields include: Source File Name, Title, Sort Title, Creator Name, Creator Role, Publisher, Retail Info (Ready for Lending Date), Format Information (File Name and Software Version), Language(s), Geographic Rights, Subject(s), Short Description, Ready For Lending Status.

2. Login to your Content Reserve account: www.contentreserve.com.

3. Click on the **Collection** tab.

4. Go to *OverDrive Community Reserve > Manage Local Content.*

5. To add a new item to your local collection, click on the **Add Local Content** option.

Additional options are available from this page …

▶ **Add Format To Existing Local Content**

Add a new format to a title in your Local Content.

For example: If you have already added a title as a PDF eBook, then also wanted to add the same title in another format (let's say an Open PDF Book), then you would choose this option.

This opens the previously created title record. Then simply complete only format-specific metadata fields such as DRM rights.

▶ **Edit Existing Local Content**

Edit metadata or upload a revised file for a title already in your Local Content.

Note: Mobile records (for video) should never be edited. The reason is that edits made to the primary record will be carried over to the mobile record, but the reverse is not true. Updates / edits should be made to the primary record only.

▶ **Delete Local Content**

Delete a title from your Local Content.

▶ **Share Local Content**

Manage which of your Local Content is added to OverDrive Community Reserve and made available to other libraries.

6. When the 'Terms and Conditions' screen appears, review each item. To continue, click **I Accept** at the bottom of the 'Terms and Conditions' screen.

Note: A text version of this agreement is available from Appendix B in this document.
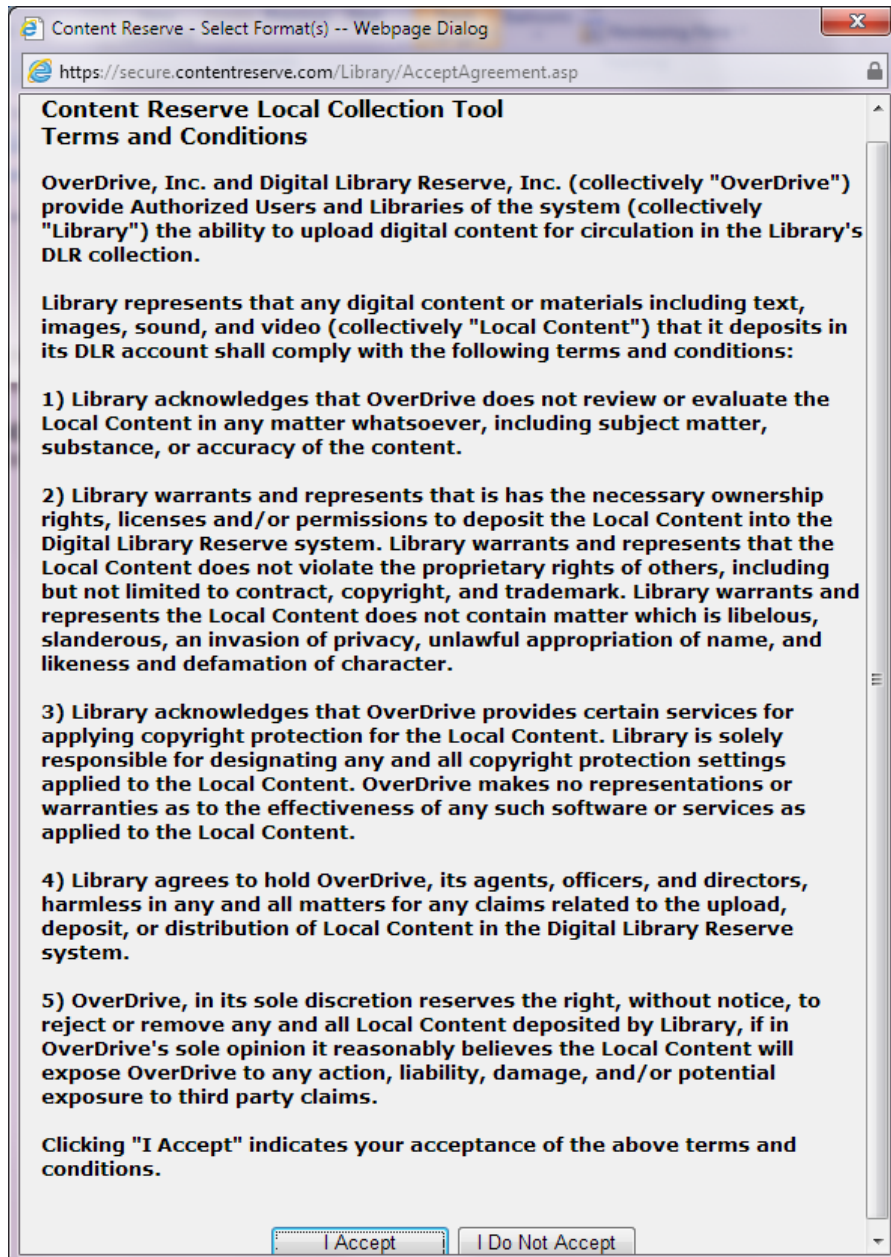
7. The 'Select Format' screen will be displayed. Select the format(s) to be cataloged and click **OK**.
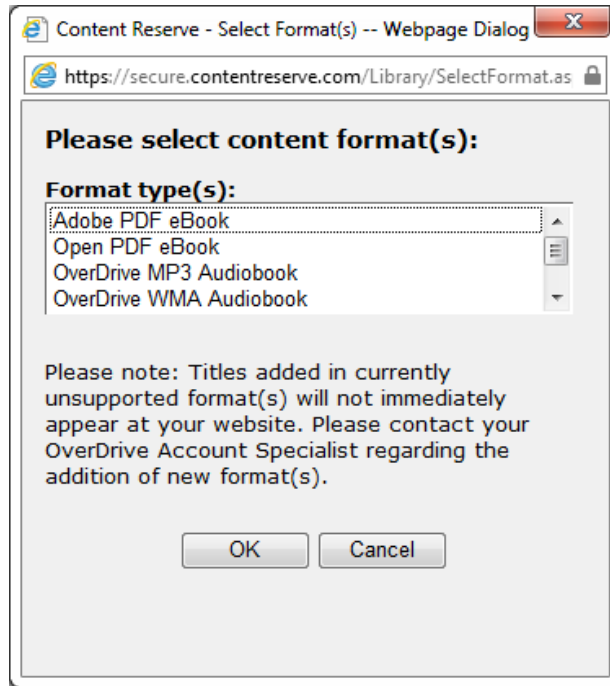
8. The Local Content upload menu will be displayed. Required panels are marked with a blue star. Submit the information for each panel starting from top to bottom.

You may use the 'Mark page as' (completed or flagged) options as visual reminders if a panel is completed or not.
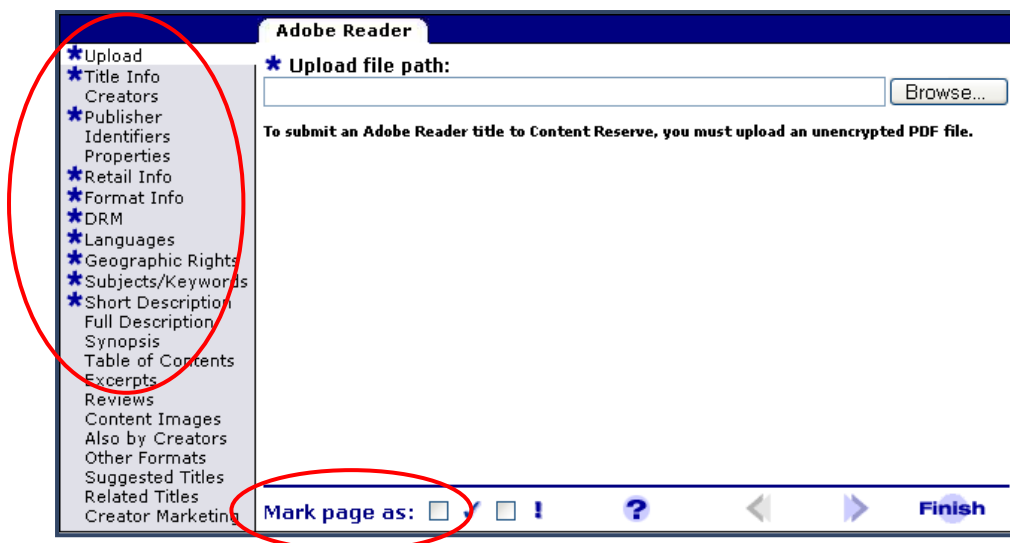
UPLOAD (<u>PDF eBooks only</u>): To upload a PDF file, click **Browse**. Then select the file you want to upload.

Audiobooks, music, and video: OverDrive will need to upload audio, music, and video content. This is due to the large file sizes for these materials. In this case, leave this screen blank.
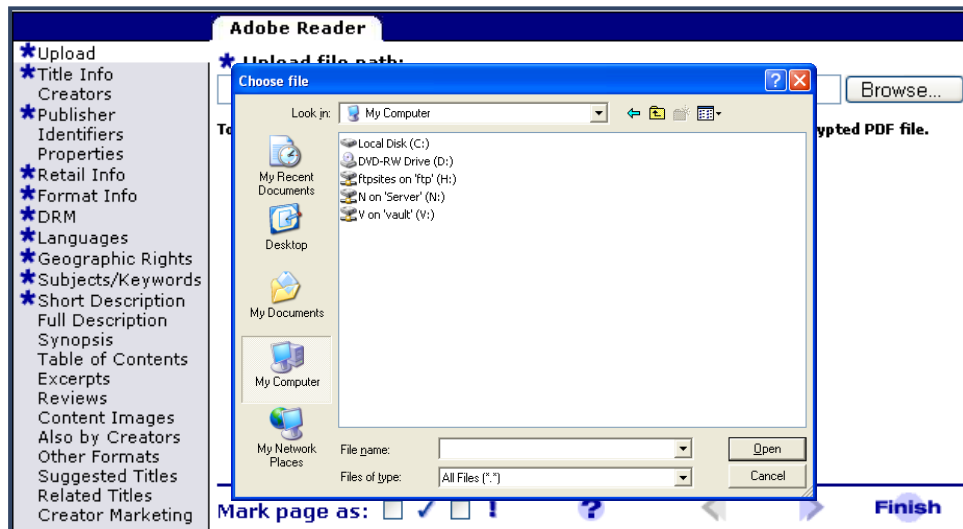
9. TITLE INFO: Enter the title information. If you have this information in a worksheet, just copy the text and paste it to the appropriate fields.

    Please Note: The 'Sort Title' text should be the 'Title' field without leading articles (A, An, The, etc.), special characters, or punctuation. This is automatically populated upon entering a Title in the field above; make changes as needed.

10. CREATORS: Add Creator names and roles. The 'Creator' field may include: Author(s), narrator(s), translator(s), illustrator(s), conductor(s), composer(s), artist(s), director(s), etc. Click **Add** to enter a new Creator name / role.

To rank creators in order, select an entry, and then click **Up** or **Down** to position the entry.
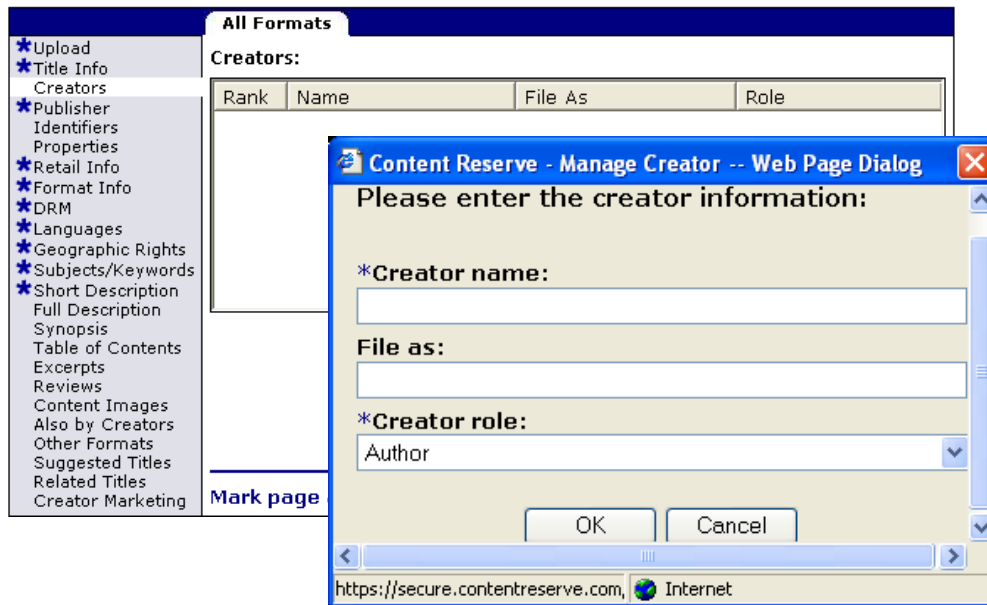
11. PUBLISHER: Add the name of the Publisher. If the Publisher's name is not included in the drop down, click **Add** to enter a new Publisher name.
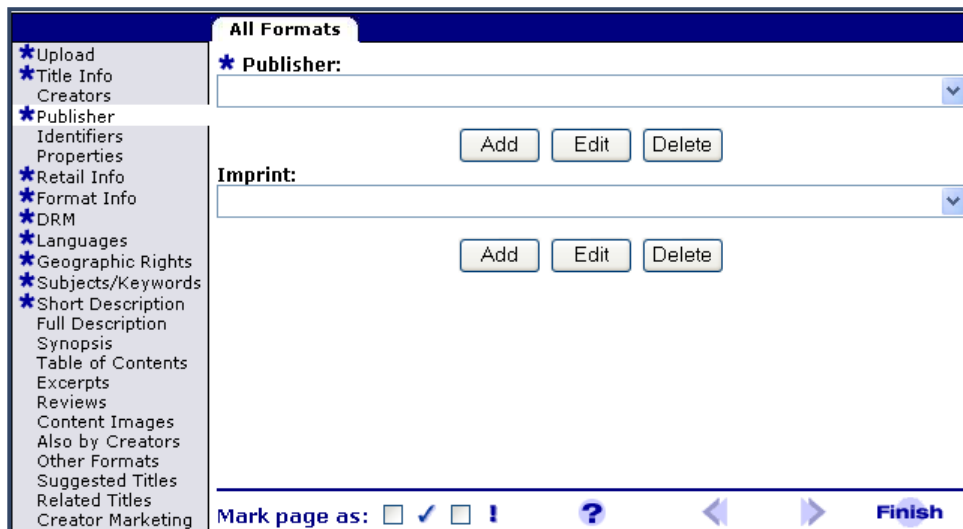
12. RETAIL INFO: Enter the 'Ready for lending date' of the title. This is the date the title will become available for lending at your OverDrive site.

Note: If the 'Ready for lending date' is the current date or a past date, the title will be available for checkout once the title is marked 'Ready for Lending.' If the date entered to this field is in the future, patrons can place holds, but will not be able to checkout / download the title until the 'Ready for lending' date.

13. FORMAT INFO: Enter the 'Download file name' of the title (this is populated by the system and is usually the title and unique identifier – ISBN, UPC, etc.) and the minimum software version. If the download file name is different than displayed, please enter the correct file name (use of spaces or special characters is not supported).

14. DRM: Digital Rights Management (DRM) protection technology is available for Local Content. In the DRM panel, select which DRM level to apply to your title.

15. LANGUAGES: Select from the available list the language in which your title is written. You may select multiple languages from the list if this applies to your content. Click

Add to add the selected languages to the Selected Languages list.

16. GEOGRAPHIC RIGHTS: Select either **Worldwide** or **Selected Countries**. If you choose **Selected Countries** you will have an additional option to select specific countries. When a country is included in Geographic Rights it indicates that the title includes permission for lending by a library in that country.

17. SUBJECT / KEYWORDS: For 'Subject 1' select either **Fiction** or **Nonfiction**. Then choose up to three additional subjects to describe your title. You may also enter 'keywords'.

18. SHORT DESCRIPTION: Enter a short description of no more than 1000 characters.

19. CONTENT IMAGES (Optional): We strongly recommend you submit full size cover and thumbnail images. These images will display on your library's OverDrive site.

Images must be saved as RGB jpg images. Portrait style is preferred.

The recommended sizes for images are:

▶ Cover Image: 510 x 680 px

▶ Thumbnail Image: 99 x 132 px

To upload images:

▶ Select **Content Images** from the left menu bar.

▶ Select the type of image to upload. Then click **Edit**.

▶ Browse on your computer to locate the image file. Click **OK**.

If you do not have cover or thumbnail images, talk with your OverDrive Account Specialist about options.

20. Additional metadata such as Full Description, Synopsis, Table of Contents, Excerpts, Reviews, Also by Creators, Other Formats, Suggested Titles, Related Titles and Creator Marketing are available. The more information you submit for each title you upload, the better.

21. When you are finished adding information, click the **Finish** button.

22. LENDING STATUS: Next, you will be prompted for the lending status of the title.

<u>PDF eBooks</u>: Check this box if you have uploaded complete metadata and source file(s) for an Adobe eBook.

<u>Audiobooks, Music, Video</u>: If you have uploaded metadata for Audiobooks / Music / Video, or you have edited an existing record for one of these formats, please do NOT mark this box.
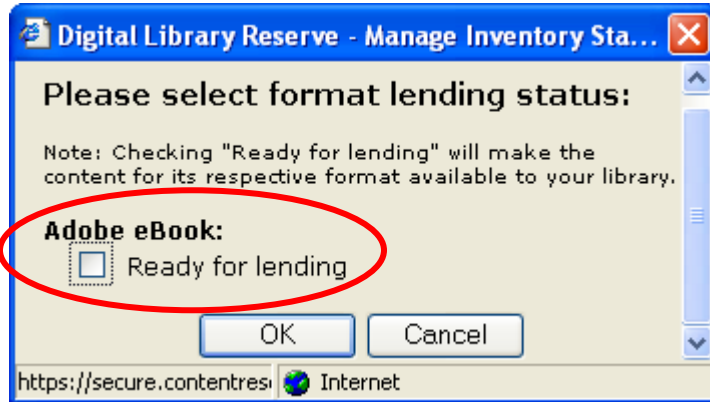
23. CONFIRMATION PAGE: Review all the submitted information. Click the **Cancel** button if you wish to change any of the information, or on the **Confirm** button, if everything is correct.

24. COMMUNITY RESERVE: For titles with 'Ready for Lending' status, an additional option is provided to add the title to OverDrive's Community Reserve. More information on Community Reserve is provided in the next section.

25. SUCCESS: When the success screen is displayed, the title has been successfully uploaded and added to your Local Content inventory.

How to Save and Edit

1. Content Reserve automatically saves all the metadata that you submit, allowing you to complete the upload process or edit your entries at a later time.

    ▶ Edit an incomplete entry: To edit metadata or complete the upload process for a title you have already started, go to:
    Collection tab > OverDrive Community Reserve > Manage Local Content > Continue Work.

    ▶ Edit an uploaded entry: To edit the metadata for a previously uploaded title, go to: *Collection tab > OverDrive Community Reserve > Manage Local Content > Edit Existing Local Content.*

    Note: *Mobile records (for video) should never be edited. The reason is that edits made to the primary record will be carried over to the mobile record, but the reverse is not true. So updates / edits should be made to the primary record only.*

2. While entering metadata, you can use the 'Mark page as' (completed or flagged) options as visual reminders if a panel is completed or not.
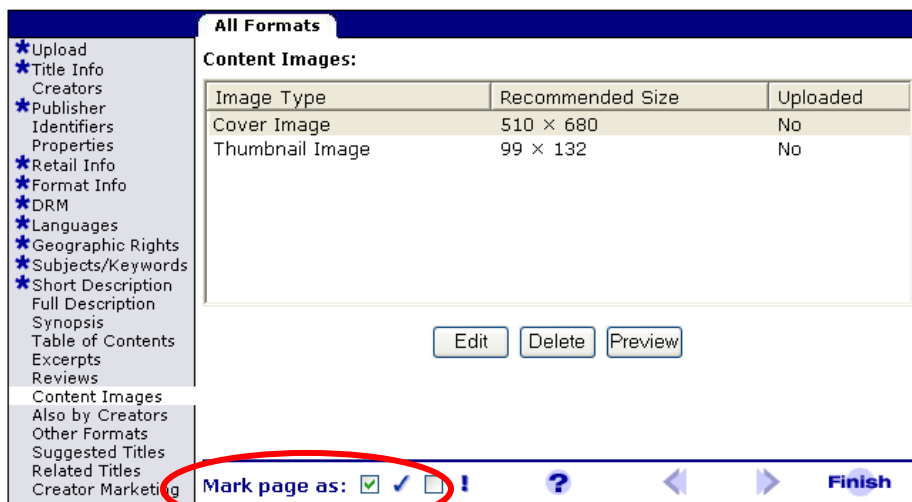
Community Reserve

Selecting titles submitted by other libraries

Getting Started

In this section, you will learn how to select Local Content titles submitted by other libraries for use at your digital library. There is no charge to add these titles to your own digital library. Once Local Content titles are added, patrons may browse, check out, and download these titles from your library's OverDrive site.

Downloads are counted and tracked just like other purchased titles.

Add the Preview feature

The Preview feature allows you to download any title in the OverDrive catalog for 24 hours before making a purchase decision. This includes free titles from Community Reserve.

To request the Preview feature, please send your IP address / range and your Content Reserve Login ID to your library / consortium's OverDrive Account Specialist.

Step by Step

1. Login to your Content Reserve account: www.contentreserve.com.
2. Click on the **Collection** tab.
3. Click **OverDrive Community Reserve**.

4. Click **Manage Community Collection**.

5. The OverDrive Community Reserve page opens and displays many options for searching and selecting titles to add to your local collection.
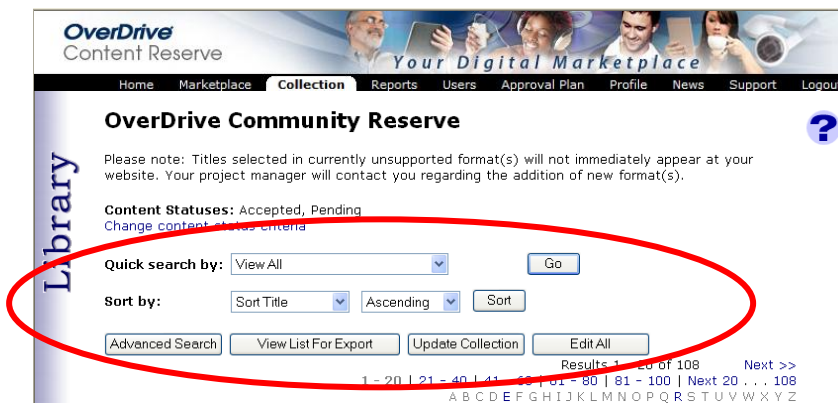
▶ **Quick Search:** Perform a Quick Search by Title, Creator, Subject, or Publisher. Choose 'View All' to display all available Community Reserve titles.

▶ **Sort by:** Sort search results by Title, Creator, Publisher, or Date Published.

▶ **Advanced Search:** Create a more complex search. Choose from Title, Creator, Format, Library, Publisher, Identifier (ISBN or DOI), Subject, Keyword, or Date Added.

▶ **Update Collection:** Adds 'Accepted' titles to your OverDrive digital library. Titles will be made live within the next 24 hours.

▶ **View List for Export:** Displays search results in a list view with the option to export to an Excel spreadsheet.

▶ **Edit All:** Option to batch update all search results at one time.

6. For each title in your search results, choose from the following options:

- ▶ **Accept this title:** Marks the title to be added to your OverDrive digital library.

- ▶ **Decline this title:** Marks the title to be declined. It will not be added to your OverDrive digital library.

7. To add accepted titles to your OverDrive digital library, click **Update Collection**. Titles will typically be made live within 24 hours.

Sharing Local Content

Getting Started

In this section, you will learn how to manage which of your Local Content is added to OverDrive Community Reserve and made available to other libraries.

Step by step

1. Login to your Content Reserve account: www.contentreserve.com.

2. Click on the **Collection** tab.

3. Click **OverDrive Community Reserve**.
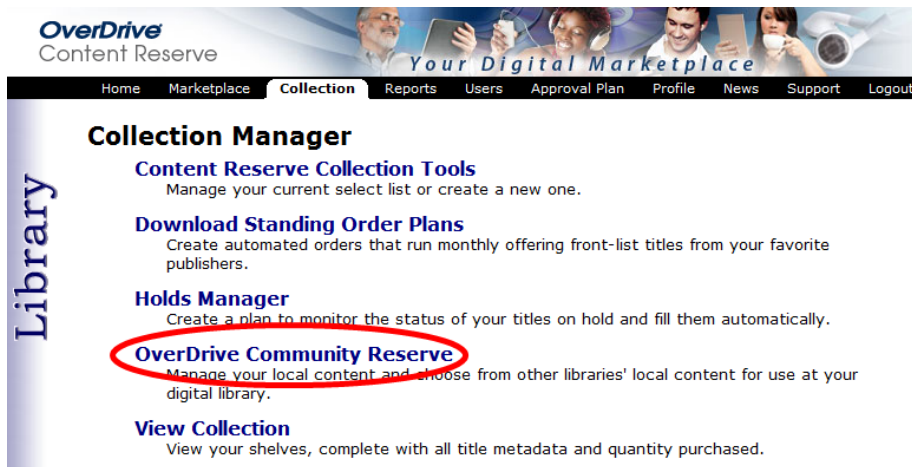
4. Click **Share Local Content**.

5. 'Your Local Collection Content' will open and display all the Local Content titles your library has cataloged and uploaded.

6. Choose from the following options:

▶ **Share:** Makes a title available for other member libraries to add to their own OverDrive digital library.

▶ **Restrict:** Other libraries will not be able to add the title to their OverDrive digital library site.

7. Click **Update** to save your settings.

8. Titles marked 'Share' will become available for other libraries from:

Content Reserve > Collection tab > OverDrive Community Reserve > Manage Community Collection.

APPENDIX A

How to create an Adobe PDF eBook

In order to upload a text-based title and make it available as an Adobe eBook, the entire title, including cover art and all images, will need to be converted to PDF format.

Convert documents to PDF

You can convert electronic documents from virtually any application to Adobe PDF. This is the format of Adobe eBooks. However, the conversion method can vary between applications.

OverDrive settings (required and recommended)

Please follow OverDrive's settings for creating an Adobe eBook:

Required Settings:

1. **Version Compatibility:** Adobe Acrobat version compatibility should be set to 'Acrobat 5 (PDF 1.4)' or 'Acrobat 6 (PDF 1.5)'.

2. **Images:**

   ▶ Color and grayscale images should be downsampled to 150 dpi and monochrome images downsampled to 300 dpi.

   ▶ Images that are image masks are not compatible and must be converted to single-layer type images.

   ▶ JPG2000 (JPG2K) images are not supported by ADE. Images saved in this format will appear as blank white spaces/boxes and will not render correctly.

Recommended Settings:

1. **Formatting Setup:**

   ▶ All opening pages, including the title cover, should be included in a single PDF file.

   ▶ There should be a blank page after the title cover to ensure that the pages appear on the correct sides when using two page view in Adobe® Digital Editions.

   ▶ A table of contents should be included. It is strongly recommended each item in the table of contents have a hyperlink to the associated page or section in the title. This will require inserting each link and testing that the links correctly point to the appropriate section or page.

   ▶ If you have any questions about rights to any image or illustration, it should simply be removed. **Do not** include photographs or illustrations if you are uncertain of the legal right to re-publish the image.

2. **PDF Font Settings:**

   ▶ *Make sure that all fonts are set to embed*, including Base 14 fonts. (Base 14 fonts are specific common fonts installed as a part of the Adobe Acrobat

installation.) *There should be no fonts in the 'Never Embed'* section of Distiller options.

▶ Set 'Subset Embedded Fonts When Percent of Characters is Less Than' option to 100%.
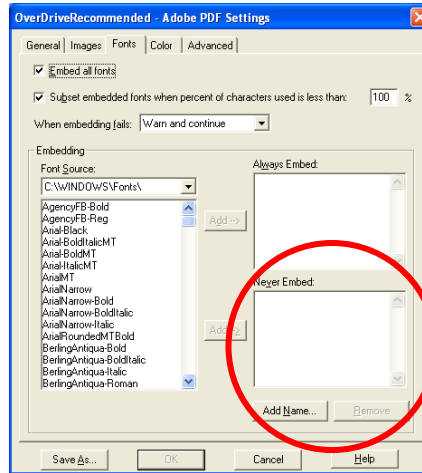
3. **Adobe Acrobat Settings:**

▶ 'Initial View' settings (Page Layout, Magnification, Window Options) can be specified.

▶ Pages should be renumbered in Acrobat to reflect the actual page numbers in the print book.

▶ Additionally, Adobe recommends that the cover image should be 'Page Numbered' or designated as Capital *'C'*.

APPENDIX B
Supplier Agreement

***OverDrive Digital Library Reserve Local Collection Tool
Terms and Conditions***

OverDrive, Inc. ("OverDrive") provides authorized users and libraries of its Digital Library Reserve ("DLR") system (collectively "Library") the ability to upload digital content for circulation in the Library's DLR collection. Supplier has authorized Library to upload Supplier's digital materials on Supplier's behalf into Library's DLR account.

Supplier represents that any digital content or materials including text, images, sound and video (collectively "Local Content") that Library deposits, on Supplier's behalf, in Library's DLR account shall comply with the following terms and conditions:

1. Supplier permits Library, on Supplier's behalf, to deposit digital content or materials into Library's account for lending, at no cost to Library, to all DLR authorized Libraries who select to add the content to the Library's DLR collection.

2. Supplier acknowledges that OverDrive doesn't review or evaluate the Local Content in any matter whatsoever, including subject matter, substance, or other contents.

3. Supplier warrants and represents that it has the necessary ownership rights, licenses and/or permissions to allow Library to deposit the Local Content into the DLR system. Supplier warrants and represents that the Local   Content does not violate the proprietary rights of others, including but not limited to contract, copyright and trademark. Supplier warrants and represents the Local Content does not contain matter which is libelous, slanderous, an invasion of privacy, unlawful appropriation of name, and likeness and defamation of character.

4. Supplier acknowledges that OverDrive provides certain services for setting copyright protection for the Local Content. Supplier shall communicate to Library its preferences for designating the copyright protection settings applied to the Local Content. OverDrive makes no representations or warranties as to the effectiveness of any such software or services as applied to the Local Content.

5. Supplier agrees to hold OverDrive, its agents, officers and directors, harmless in any and all matters for any claims related to the upload, deposit or distribution of Local Content in the DLR system.

6. OverDrive, in its sole discretion, reserves the right, without notice, to reject or remove any and all Local Content deposited by Library on Supplier's behalf, if in OverDrive's sole opinion it reasonably believes the Local Content will expose OverDrive to any action, liability, damage and/or potential exposure to third party claims.

Accepted and Agreed this _____day of _____ 2011 by:

_____
("Supplier")

By (signature): _____

_____

Name (Print): _____ _____

_____

Title: _____ _____