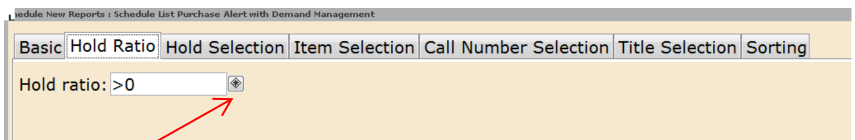
List Purchase Alert with Demand Management (AKA High Demand Holds)

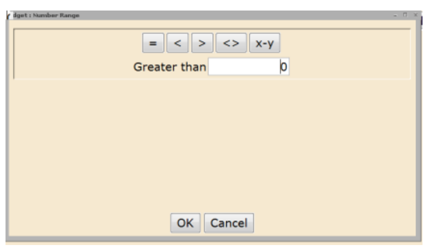
This report will identify by title the items that meet the specific ratio of holds for pickup at your library to the number of copies either owned by your library or number of copies system-wide. You can choose to run either or both reports. A template has been created for your library to use, it are labeled xxx High Demand Holds (xxx is your library three letter agency code).

To personalize your template:

- find your template in the list of templates
- highlight the template name by clicking on it
- click on the Setup and Schedule button at the bottom of the screen
- when the report opens up click on the Hold Ratio tab

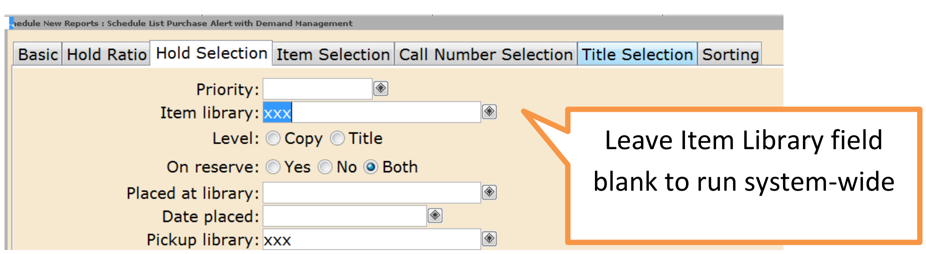


- click on the gadget for assistance in entering the ratio of holds to copies you want as your criteria



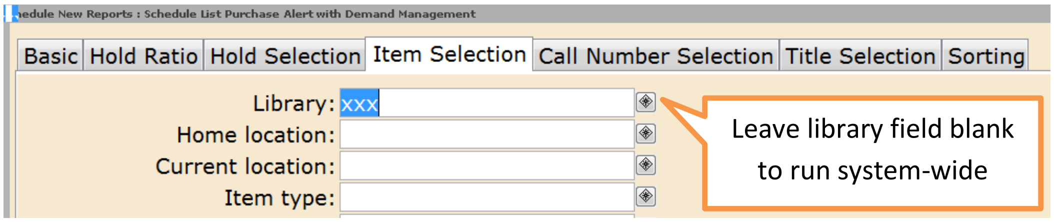
then click on OK

- Click on the Hold Selection tab and enter your library 3 letter code in the “Pickup Library” field. If you want a ratio of holds to only your library copies also enter your three letter code in the “Item Library” field. If you want a hold ratio report for all library copies system-wide leave “Item Library” blank.



- Click on the Item Selection tab. To run a report for just those items owned by your library (the ratio of holds for pickup at your library to the number of your copies), enter your library 3 letter code in the “Item Library” field.

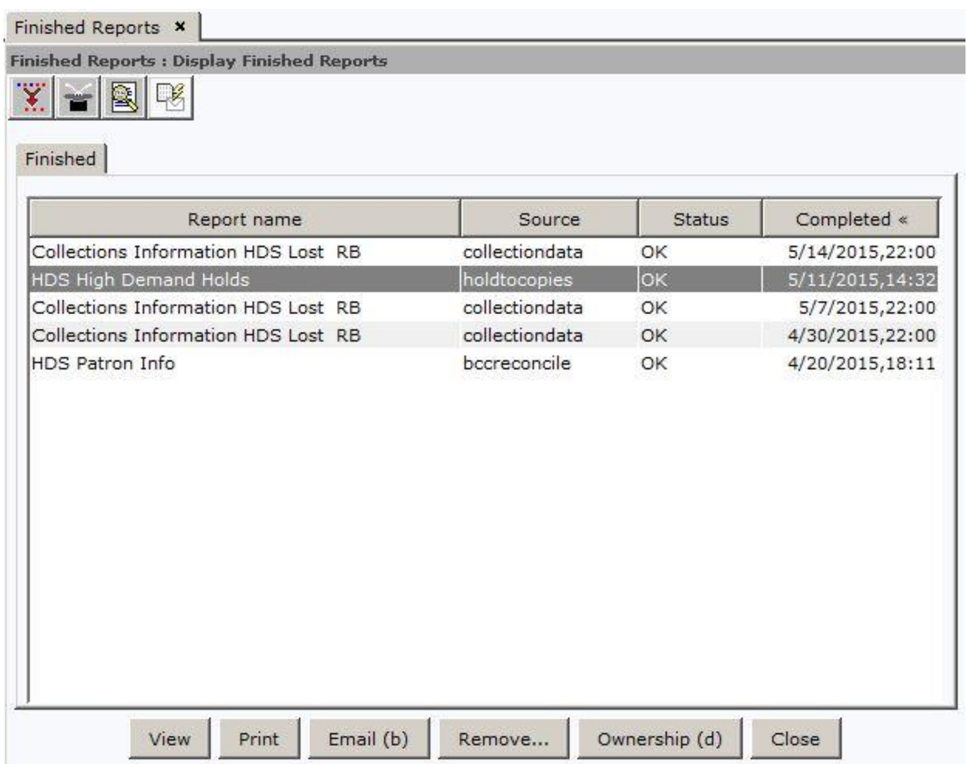
- Both the “Item Library” field on the Hold Selection tab and the “Library” field on the Item Selection tab have to be completed if you want a report for only your library copies.



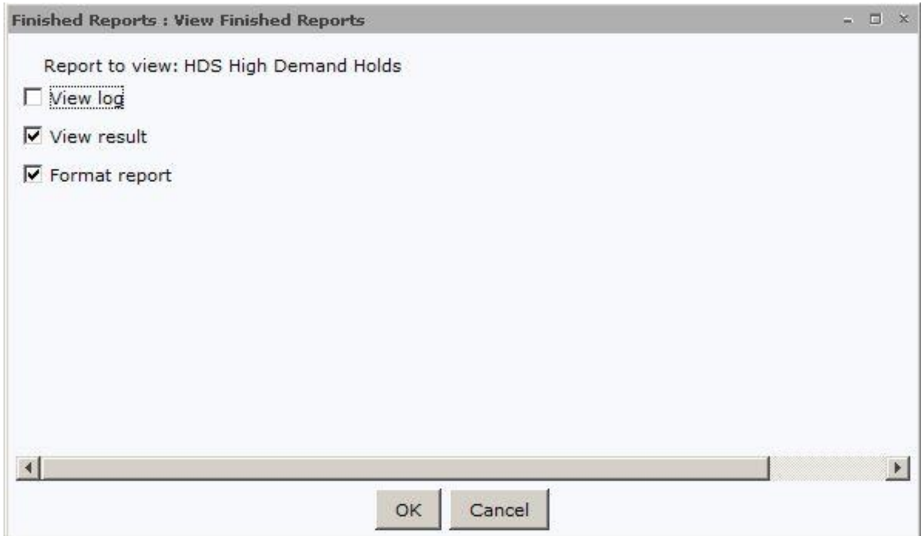
- If you want to run a report across the entire system, leave the “Library” field blank on the “Item Selection” tab and “Item Library” field blank on the Hold Selection tab. By leaving these two fields blank it runs the ratio of the pickup library you have specified against the number of copies in the entire system.
- Then click on the “Run Now” button or “Schedule button” as you prefer.

Once your report has run, you can view your report online or to view results in Excel:

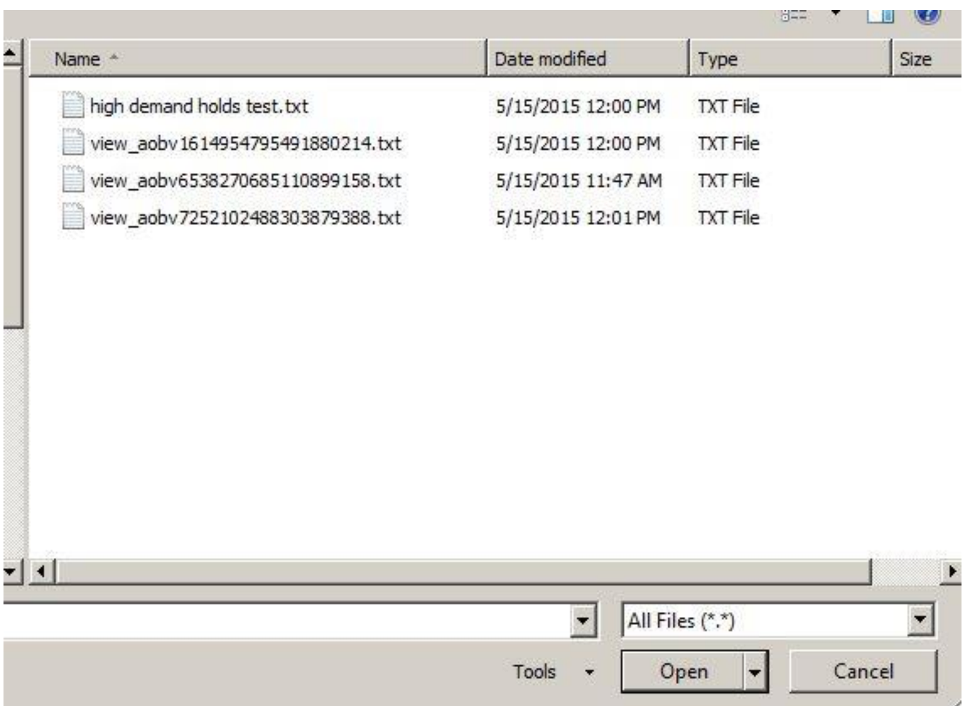
- Highlight your report and click the “View” button:



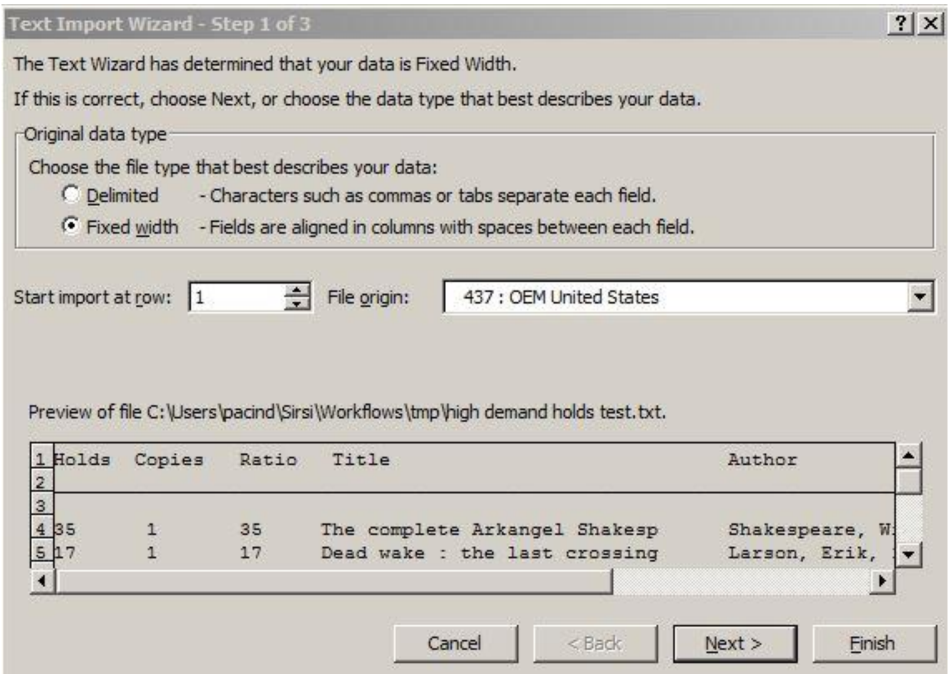
- Uncheck the “View log” checkbox:



- The report should open in the text file viewer configured in “Report Session”, typically wordpad or notepad. Save the file as a plain text file with a .txt extension. Name it and save it somewhere you will easily be able to find it again.
- Open Excel.
- Go to “File” and “Open”; change the file type to “All Files (*.*)”



- Double click on the file you just saved or click “Open”.
- The Excel Text Import Wizard should default to “Fixed width”, which is what you want.



- Click "Finish". You will need to adjust column widths but otherwise the data should be in a useable format.

If you should have any questions, please contact SWAN Member Services at 630-734-5153 or send an email to help@swanlibraries.net .