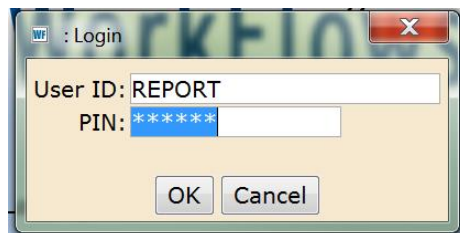


High Demand Holds

The New High Demand Holds report will identify by title the items that meet the specific ratio of holds for pickup at your library to the number of copies owned by your library and the number of copies system-wide. A template has been created for your library to use. To be certain you are using the correct report, check the “source” column and be sure it reads “hdemandholds”.

Getting Started

Login to Workflows using the User ID: REPORT and PIN: REPORT



Once you have logged in, click the Report Session wizard to view your settings. Click on the gadget to find where Excel is mapped on your computer in the “Application to view XLS reports”.

Application to view reports:	C:\Program Files (x86)\Notepad++\notepad
Application to print reports:	c:\program files\Windows NT\accessories\
Application to view XML reports:	C:\Program Files\Microsoft Office\root\Of
Application to view XLS reports:	C:\Program Files\Microsoft Office\root\Of

To Personalize the Template

- Select the High Demand Hold report and click on the Copy button at the bottom of the screen.
- When the report opens change the name of the report in the **Basic** tab by adding your three-letter agency code to the beginning of the title.

- Click on the **Hold Selection** tab and enter your library's agency code in the Pickup library section. Choose a hold status of ACTIVE.

Basic Hold Selection Title Selection Call Number Selection Item Selection User Selection

Priority: [dropdown]
 Item library: [dropdown]
 Level: Copy Title
 On reserve: Yes No Both
 Placed at library: [dropdown]
 Date placed: [dropdown]
 Pickup library: **WRS** [dropdown]
 Number of pickup notices: [dropdown]
 Expiration date: [dropdown]
 Date notified: [dropdown]
 Available: Yes No Both
 Recall status: [dropdown]
 Hold range: [dropdown]
 Hold status: ACTIVE [dropdown]
 Date inactive: [dropdown]
 Inactive reason: [dropdown]
 Date cancellation notified: [dropdown]
 Date suspended: [dropdown]
 Date unsuspended: [dropdown]
 No holds barred: Yes No Both
 Date recalled: [dropdown]
 Date available: [dropdown]
 Available Expiration Date: [dropdown]
 Hold associated w/ user group: Yes No Both

- Leave the **Call Number Selection** tab blank.
- Click on the **Title Selection** tab in the report.
- The template is set to select titles with more than zero system-wide title holds. If you have a different ratio based upon your library's selection policy, enter it in the Number of title holds section on this tab.

Basic Hold Ratio Hold Selection Item Selection Call Number Selection Title Selection Sorting

Format: [dropdown]
 Accountable: Yes No Both
 Review record: Yes No Both
 Date created: [dropdown]
 Created by: [dropdown]
 Date cataloged: [dropdown]
 Date modified: [dropdown]
 Modified by: [dropdown]
 Publication year: [dropdown]
 Number of libraries: [dropdown]
 Number of call numbers: [dropdown]
 Number of copies on order: [dropdown]
 Number of title holds: **>0** [dropdown]
 Number of total holds: [dropdown]
 Shaded: Yes No Both

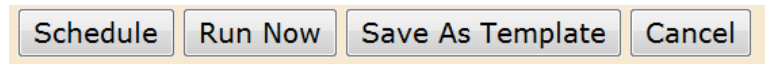
- Click on the **Item Selection** tab to make sure the non-SWAN ILLs are excluded.

- If they are not, it is probably easiest to enter this using the gadget and choose “Excludes selected policies.”

- To run this report for **ONLY your users**, select your three-letter agency code under the Library section.

- Click OK


- You can Schedule the report or you can Run Now.



- After you run the report, Click on Display Finished Reports.



- Since this is a pipe delimited report, you are going to have to import this report into an Excel Spreadsheet.

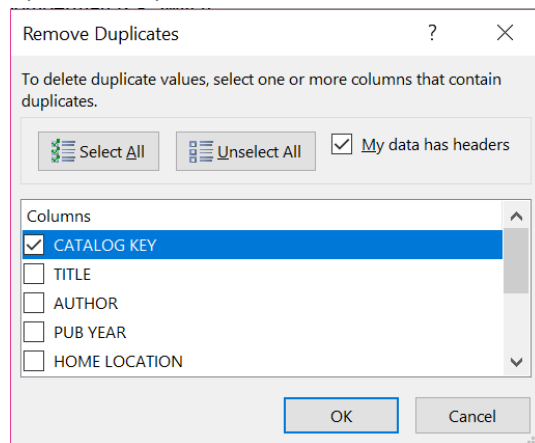
- To view report, click the “Fixed Format Manager” icon: 
- Find your report by file name in the report log or by run time. Highlight the file name and click view, the report will then open in excel.

- Once you have opened the spread sheet you are going to remove duplicates.

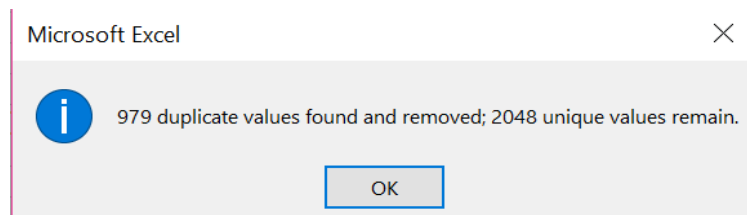
- In excel click on the Data tab
- Select all columns and press the remove duplicates button.



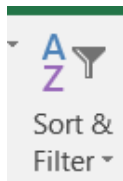
- You will then get this selection box. Make sure that you only select the catalog key option, and press ok.



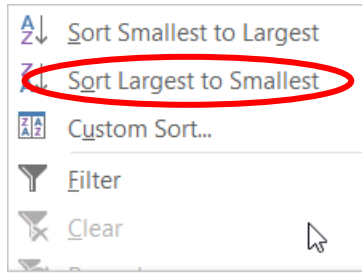
- Excel will tell you how many duplicates were taken out. Press ok and begin your work with the document.



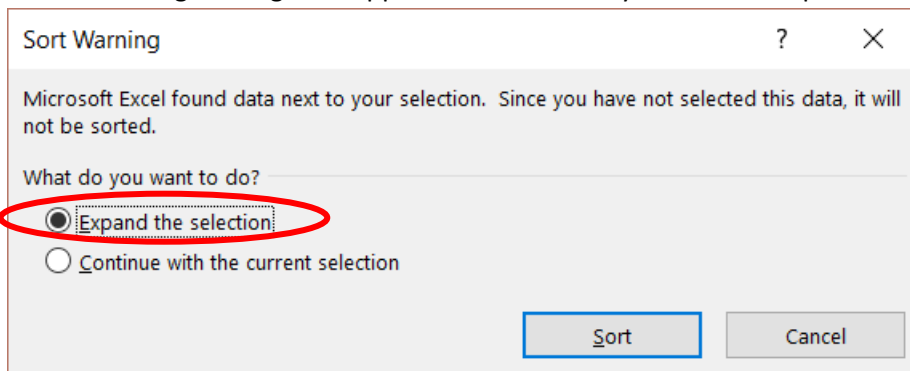
- If you would like to change your view to see titles with a higher number of local holds first, click on the # LOCAL HOLDS column, and click on the Sort & Filter button.



- Choose Sort Largest to Smallest.



- A Sort Warning message will appear. Make certain you choose “Expand the selection”.



- Click Sort.
- The results will now show the titles with the largest number of local holds on top.