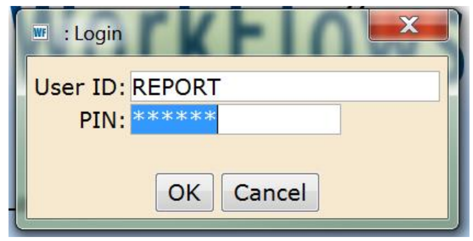
High Demand Holds

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.

Getting Started

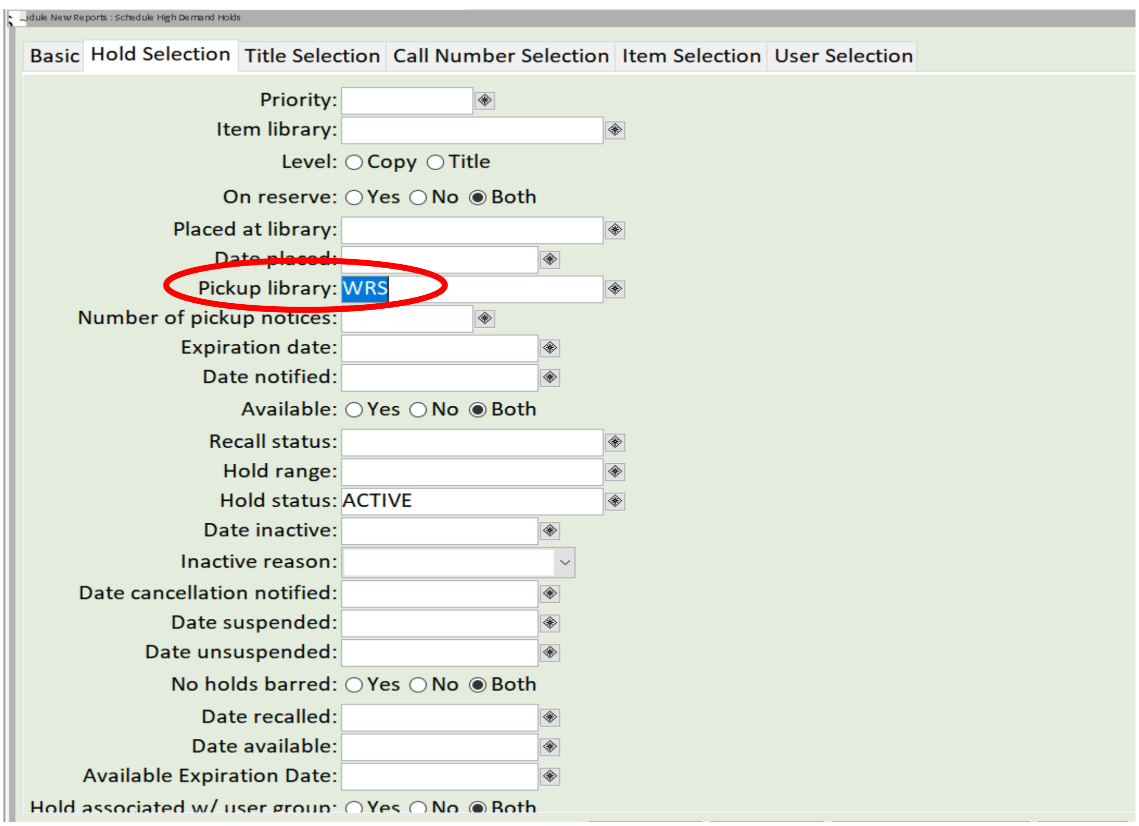
Login to Workflows using the User ID: REPORT and PIN: REPORT



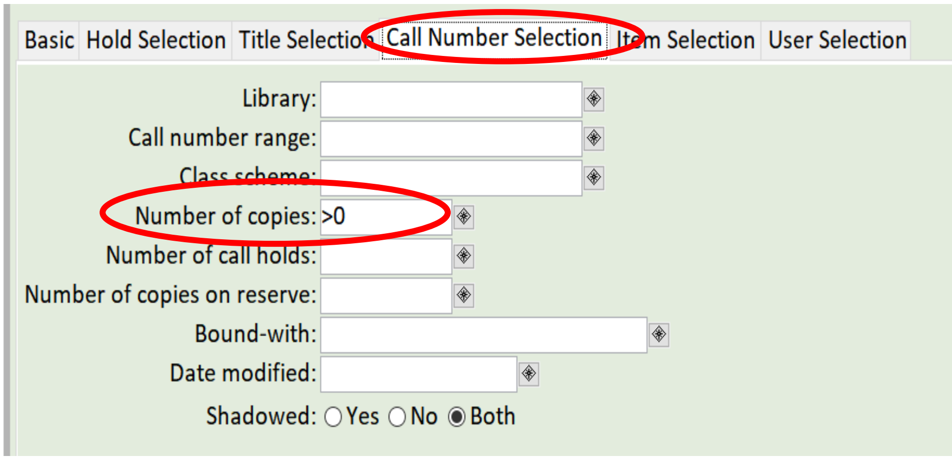
Once you have logged in click on Schedule New Reports, you may or may not have to review your session settings dependent on your own settings. After reviewing your session settings, click OK.

To Personalize the Template

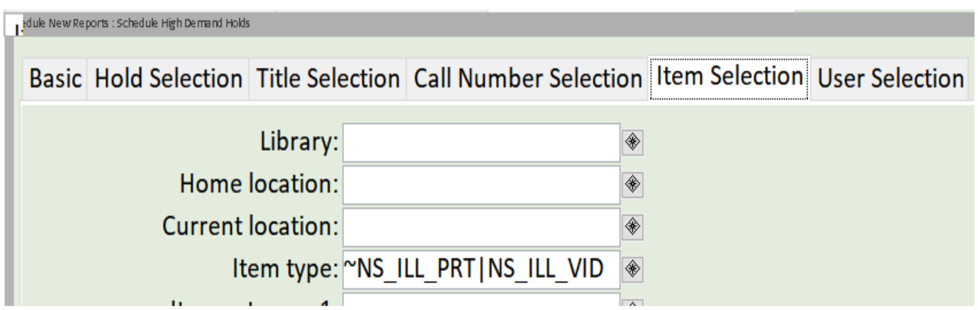
- Select the High Demand Hold report and click on the Copy button at the bottom of the screen.
- When the report opens change the name of the report in the **Basic** tab by adding your three-letter agency code to the beginning of the title.
- Click on the **Hold Selection** tab and enter your library's agency code in the Pickup library section. Choose a hold status of ACTIVE.



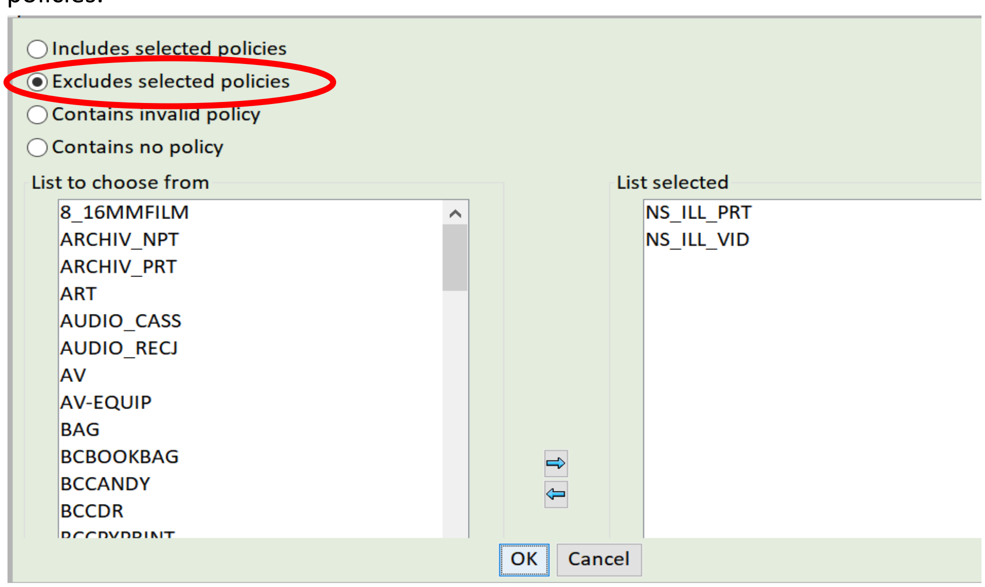
- Leave the **Title Selection** tab blank.
- Click on the **Call Number Selection** tab in the report.
  The template is set to select any items greater than zero. If you have a different ratio based upon your library's selection policy, you will enter it in the Number of copies section on this tab.



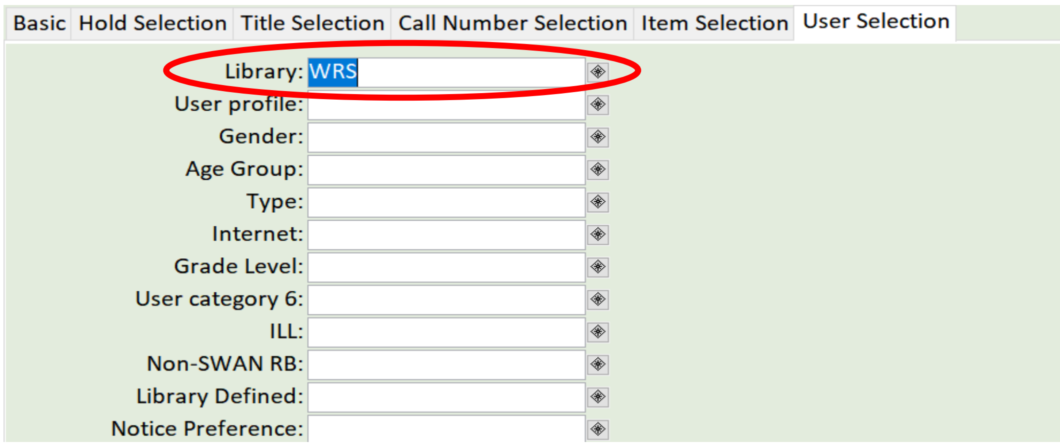
- Click on the **Item Selection** tab to make sure the non-SWAN ILLs are excluded.



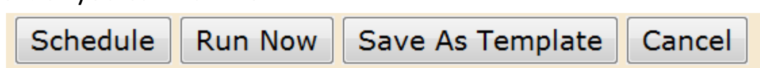
- If they are not it is probably easiest to enter this using the gadget and choose "Excludes selected policies."



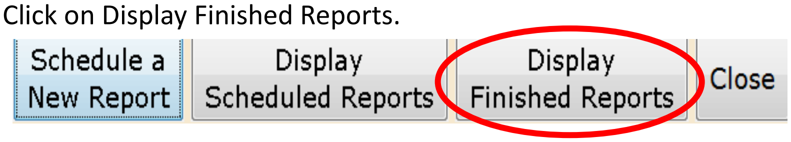
- Leave the **User Selection** tab blank. If you would like to run this report for **ONLY your users**, select your three-letter agency code under the Library section.

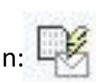


- Click OK
- You can Schedule the report or you can Run Now.

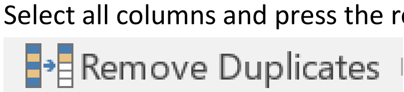


- After you run the report, Click on Display Finished Reports.

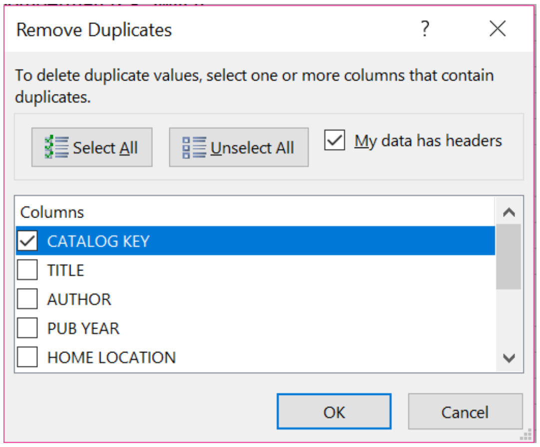


- Since this is a pipe delimited report, you are going to have to import this report into an Excel Spreadsheet.
    - To view report, click the “Fixed Format Manager” icon: 
    - Find your report in the list and double click it. The report will open in excel

- 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.