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

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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 threeletter 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.
 Lidda New Reports: Schedule High Dermind Holds

Basic Hold Selection Title Select	tion Call Number Selection Item Selection User Selection
Priority:	*
Item library:	*
Level:	⊖Copy ⊖Title
On reserve:	⊖Yes ⊖No ⊛Both
Placed at library:	*
Date placed:	•
Pickup library:	WRS 🔪
Number of pickup notices:	
Expiration date:	
Date notified:	
Available:	⊖Yes ⊖No ⊛Both
Recall status:	*
Hold range:	*
Hold status:	ACTIVE
Date inactive:	
Inactive reason:	~
Date cancellation notified:	
Date suspended:	*
Date unsuspended:	
No holds barred:	⊖Yes ⊖No ®Both
Date recalled:	*
Date available:	
Available Expiration Date:	
Hold associated w/ user group.	∩Yes ∩No @Both



🖭 : Login	×
User ID: REPORT	
PIN: *****	
ОК	Cancel

- 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.

Basic Hold Selection Title Sele	ection Call Number Selection Itom Selection User Selection
Library:	· · · · · · · · · · · · · · · · · · ·
Call number range:	*
Class scheme:	*
Number of copies:	>0
Number of call holds:	*
Number of copies on reserve:	•
Bound-with:	*
Date modified:	*
Shadowed:	⊖Yes ⊖No ⊛Both

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

edule New Rej	oorts : Schedule High Demand Holds									
						1				
Basic	Hold Selection	Title Sele	ction	Call Number	Selectior	1 Item	Selection	User	Selection	on
		Library:			*	>				
	Home	location:			*	>				
	Current	location:			*	>				
	Ite	em type: '	YNS_II	LL_PRT NS_II	L_VID 🔹	>				
						-				

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

	les selected policies				
Exclud	des selected policies				
OConta	ins invalid policy				
OConta	ins no policy				
List to cl	noose from			List	t selected
8_16	MMFILM	^			NS_ILL_PRT
ARCH	HV_NPT				NS_ILL_VID
ARCH	HV_PRT				
ART					
AUD	O_CASS				
AUD	O_RECJ				
AV					
AV-E	QUIP				
BAG					
BCBC	OOKBAG				
BCCA	NDY		4		
BCCE	DR				
BCCD			OK Can		
			OK Cano	el	

• 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.

Basic Hold Selection Title Se	election Call Number Selec	tion Item Selection Use	r Selection
Library:	WRS	*	
User profile:		*	
Gender:		*	
Age Group:		*	
Type:		*	
Internet:		*	
Grade Level:		*	
User category 6:		*	
ILL:		*	
Non-SWAN RB:		*	
Library Defined:		*	
Notice Preference:		*	

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

Schedule	Run Now	Save As Template	Cancel
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• 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.
 - \circ 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.

Remove Duplicates		?	\times
To delete duplicate values, select one or m duplicates.	nore columns	that cor	ntain
Select All	✓ <u>M</u> y data	a has he	aders
Columns			^
CATALOG KEY			
TITLE			
AUTHOR			
PUB YEAR			
HOME LOCATION			\checkmark
	ОК	Ca	ncel

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

Microso	oft Excel X
1	979 duplicate values found and removed; 2048 unique values remain.
	ОК