

## Hold Reports for Purchasing Decisions

IN ANALYTICS (Found in Shared Reports > For Libraries > Hold Reports):

1. List Titles with >4 Holds – A fairly generic report listing all titles with more than 4 holds across the system, with the Item Type displaying to help parse out On-Order vs Available items. It is paged by Pickup Library, and so shows titles with the number of holds for pickup at *that* library. Note it doesn't show if a library owns one or multiple copies: it just lists what has many holds on it, with the assumption that many holds indicates general popularity across the system.
2. List Items >5 Holds (Dossier) – As a Dossier, this report works differently than all other reports, as it's grid has special formatting. To use, select the library the hold library from across the top row, then the Item Cat1s you are considering: you can select multiple (ex, BOOK and LARGEPRINT to see all print materials). The grid then shows Total Number of Items owned across the system, the number of holds on the item at your library, and the color-coded Hold Ratio between the two: the number of holds at your library to the number of items in the system. - Note that it doesn't show if you own a title or not, but, if an item has a high Hold Ratio for your library (lots of holds at your library to few copies), you may want to purchase a/additional copies.
3. In Demand Not Owned - This report selects items that your patrons have on hold, that you don't own. The filters for the report work slightly differently than others, but the filter page has instructions (and you might already be getting it emailed to you). The report results shows titles and the number of holds for your library, though doesn't show the number of copies across the system, just that you don't own the item already: if there are a significant number of holds, based on your library's size, you might want to buy a copy of a title.
4. Items With Holds Older Than 3 Months (NEW) – The report lists holds for pickup at your library, which have been on hold for at least three months, and the item itself isn't On-Order. This could indicate that the hold was placed when the item was On-Order, and the item only recently released and able to fill holds, so take some of this with a grain of salt. But, you may want to consider purchasing copies for those items where there are holds for the item that haven't been filled in three months because the item is in high demand. Or, for those titles that are missing and with holds, perhaps you might want to consider buying a copy to fill that hold.
5. List Holds - Number Owned, System Holds – This report lists the number of copies you own of a particular title, and the number of holds across the system on that particular title. If you notice that there's a large number of system holds, purchasing a second copy might be useful to fill the system holds. (though the report doesn't show if anyone else owns the item).
6. List Holds - Own and Held – This report lists the number of copies a library owns, and the number of holds on that title for pickup at that library. So, you can see if you only own one copy of something, but have a large number of holds for pickup at your library, buying another copy would benefit your patrons.
7. Holds with Only Copy Unavailable – This report lists titles where you own the only copy in the system, which has gone missing, and there is at least one hold on the item. So, consider purchasing a replacement copy for the item, to fill the stranded hold, which may be for pickup at a different library.

8. Hold With Only Copy Unavailable - By Patron Library – This report lists holds for your patrons, where there is only one copy of the title in the system, which has gone missing, or been withdrawn, or is otherwise no longer available; this might one of your own items, or it could be an item at a different library. Either way, you might want to consider purchasing a/additional copy so that your patrons hold can be filled.

-----

WORKFLOWS: (Often found in the Finished Reports of your staff login or REPORTS)

1. List Holds No Copies – This report lists titles where you don't already own a copy, and the title has more than 20 holds system wide, at least one of which is for your patrons. This report is superseded by the Analytics report In Demand Not Owned (above) as this report has a confusing output (a list of repeating titles, one line for each of your patrons who has it on hold), making it difficult to summarize or port into Excel, and also hard-coded to only consider the most popular of titles based on number of holds.

2. List Items with >5 Holds – This report lists titles where you *already* own a copy, and 5 of your patrons have it on hold, used when you want to consider purchasing *another* copy of the item. The report does list the number of holds at your library, and the number of copies you already own. This report contains the same information the Analytics report List Holds – Own and Held (above).