HOPELESS HOLDS

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This process generates a list of holds on bibliographic records that no longer have any viable copies, built using two Evergreen reports combined in MS Excel with the VLOOKUP function.

Multi-type holds are ignored since they may be filled by items in more than one bibliographic record.

Holds that can be transferred to other bibliographic records with viable copies or re-targeted by merging duplicate bibliographic records will be filled.

Patrons with holds that remain unfillable will be notified and the holds will be cancelled.

Report 1: Holds after specified date, ignore meta-holds

Source: Hold Request

Display Fields

Display Name	Data Type	Field Transform	Source
Last Name	Text	Raw Data	Hold Request :: Hold User
First Name	Text	Raw Data	Hold Request :: Hold User
Barcode	Text	Raw Data	Hold Request -> ILS User :: Current Library Card
TCN	Text	Raw Data	Hold Request -> Hold Request Record -> Bibliographic Record :: Simple Record Extracts
Author	Text	Raw Data	Hold Request -> Hold Request Record -> Bibliographic Record :: Simple Record Extracts
Title	Text	Raw Data	Hold Request -> Hold Request Record -> Bibliographic Record :: Simple Record Extracts
Requested	Timestamp	Date	Hold Request

Base Filters

Filter Field	Field Transform	Operator	Value	Source
Capture Date/Time	Raw Data	Is NULL		Hold Request
Hold Cancel Date/Time	Raw Data	Is NULL		Hold Request
Request Date/Time	Months ago	Less than		Hold Request
Hold Type	Raw Data	Not in list	"M"	Hold Request
Is Active?	Raw Data	Equals	True	Hold Request -> Hold Request Record :: Target Bib Record
Organizational Unit ID	Raw Data	In list		Hold Request :: Pickup Library

When submitting Report 1 to run, you must select the number of months of holds and the pick-up libraries you wish to include.

Aggregate Filters

Filter Field	Field Transform	Operator	Value	Source
Hold ID	Count	Greater than or equal to	"1"	Hold Request

Report 2: Bibliographic records with no viable copies
Source: Hold/Copy Ratio per Bib

Display Fields

Display Name	Data Type	Field Transform	Source
TCN Value	Text	Raw Data	Hold/Copy Ratio per Bib -> Bibliographic Record :: Simple Record Extracts
Author	Text	Raw Data	Hold/Copy Ratio per Bib -> Bibliographic Record :: Simple Record Extracts
Title	Text	Raw Data	Hold/Copy Ratio per Bib -> Bibliographic Record :: Simple Record Extracts
Active Holds	Int	Raw Data	Hold/Copy Ratio per Bib
Volume Owning Lib	Text	Raw Data	Hold/Copy Ratio per Bib -> Bibliographic Record -> Call Number/Volume :: Owning Library

Base Filters

Filter Field	Field Transform	Operator	Value	Source
Active Holds	Raw Data	Greater than or equal to	"1"	Hold/Copy Ratio per Bib
Holdable Copy Count	Raw Data	Equals	"0"	Hold/Copy Ratio per Bib

Report Outputs

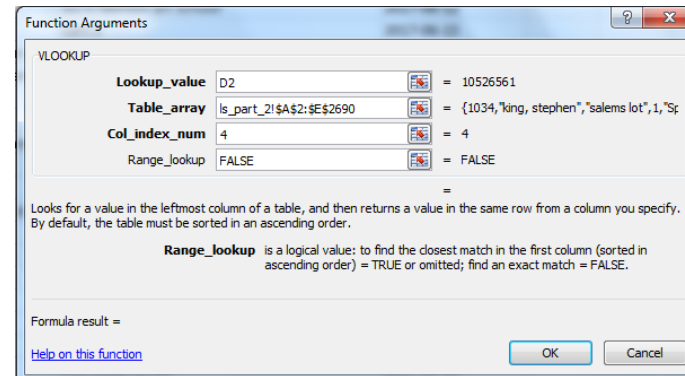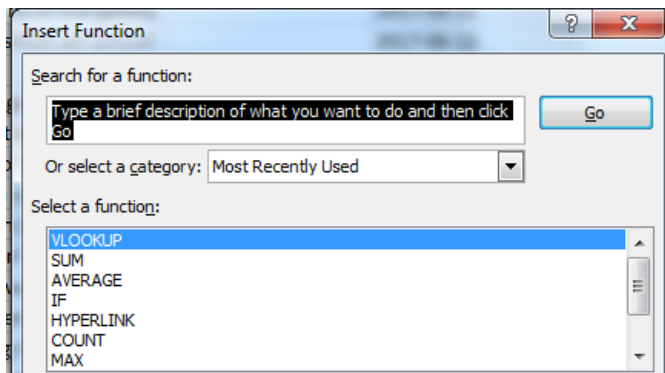## Report 1: Holds after specified date, ignoring meta-holds

	A	B	C	D	E	F	G	H	I
1	Last Name	First Name	Barcode	TCN	Author	Title	Requested		
2	XXXXXXXXX	Eugenia	111250xxxxxxx	10526561	perry, marta	second chance amish bride	2017-09-01		
3	XXXXXXXXX	Maymuna	111250xxxxxxx	10532061		guardians of the galaxy	2017-08-22		
4	XXXXXXXXX	Akil	111250xxxxxxx	10391998	flores, irene	sci fi fashion art school	2017-06-12		
5	XXXXXXXXX	Jasmine	111250xxxxxxx	10393659		cars 2	2017-06-15		
6	XXXXXXXXX	Adrienne	111250xxxxxxx	10484591	burgess, thornton w	the burgess animal book for children	2017-08-22		
7	XXXXXXXXX	Adrienne	111250xxxxxxx	588746	fisher, dorothy canfield	understood betsy	2017-09-05		
8	XXXXXXXXX	Sienna	111250xxxxxxx	10390903	coble, colleen	haven of swans	2017-05-11		
9	XXXXXXXXX	Sienna	111250xxxxxxx	9114152	bliss, lauralee	virginia weddings	2017-05-11		
10	XXXXXXXXX	Michael	111250xxxxxxx	10254911	fearnbach, heather	winston salems architectural heritage	2017-09-14		

Report 2: Bibliographic records with no viable copies

	A	B	C	D	E	F
1	TCN Value	Author	Title	Active Holds	Volume owning lib	
2	1034	king, stephen	salems lot	1	Spangler Branch	
3	2886	dunn, judy	the little goat	1	Cleveland County Main Library	
4	2886	dunn, judy	the little goat	1	Danbury Public Library	
5	2886	dunn, judy	the little goat	1	Dunn Public Library	
6	2886	dunn, judy	the little goat	1	Forsyth Children's Outreach	
7	19548		dreamtime and dreamwork	1	Cleveland County Main Library	
8	21144	lindbergh, charles a	the spirit of st louis	1	Mauney Memorial Library	
9	25746		i will be here	1	Cleveland County Main Library	
10	30105	cole, joanna	get well, clown arounds	1	BHM Headquarters Library	
11	30105	cole, joanna	get well, clown arounds	1	Cleveland County Main Library	

Combining Reports via VLOOKUP

- Open both files in Excel.

- Sort Report 2 by Column A, "TCN Value" (Evergreen and Excel sort differently)

- In Report 1, place the cursor in cell H1 (the first empty cell on a data line) and click on the f_x Function icon, then select VLOOKUP

> In the VLOOKUP Function Arguments box, enter **D2** in the "Lookup_value" field to select the first TCN value in Report 1.

> Place the cursor in the "Table_array" field of the Function Arguments box, then go to Report 2 and select all data cells; <u>do not select the headers.</u>

> Return to the Function Arguments box and enter **4** in the "Col_index_num" field to select the "Active Holds" column of Report 2.

> Enter FALSE in the "Range_lookup" field and click on OK.

- Copy the VLOOKUP formula to all cells in Column H of Report 1 using Fill-Down (Ctrl-D) or other method of your choice and sort the entire report on Column H.

- Delete all rows with "#N/A" in Column H.

- The remaining rows are your "hopeless holds"

	A	B	C	D	E	F	G	H
1	Last Name	First Name	Barcode	TCN	Author	Title	Requested	
2	XXXXXXXXX	Dennette	1112504326952	3707548	rivera, donald s	hear say	2017-09-0?	1
3	XXXXXXXXX	Dennette	1112504326952	5281251	chopra, deepak	super genes	2017-08-3(	1
4	XXXXXXXXX	Jeremy	11125043605114	3703598	shuvalova, irina nikola?	ivan shishkin, 1832 1898	2017-08-3?	1
5	XXXXXXXXX	Jeremy	11125043605114	3751795		the complete works of yuri norstein	2017-08-3?	1
6	XXXXXXXXX	Elizabeth	1112504199441	1724677	moore, thomas	the soul of sex	2017-09-0?	1
7	XXXXXXXXX	Brenda	11125041928427	217349	konijnenberg de groot,	cellophane creations	2017-09-0?	1
8	XXXXXXXXX	Christopher	11125042349359	3739072	ogilvy, guy	the alchemists kitchen	2017-09-0?	1
9	XXXXXXXXX	Darrell	11125043586702	3258793	de la soul musical grou?	de la soul is dead	2017-09-1?	1
10	XXXXXXXXX	David	11125044005850	6469318		graveyard shift	2017-09-0?	1
11	XXXXXXXXX	Coleman	11125043804527	2886	dunn, judy	the little goat	2017-09-1?	1
12	XXXXXXXXX	Susan	11125044196535	3857156		scott 2014 specialized catalogue of united stat	2017-09-0?	1
13	XXXXXXXXX	Christopher	11125042927527	3796552	palmer, robert	best of both worlds	2017-09-0?	1

Processing the Results

The goal: Try to find a way for your patron to receive what they want. If it can't be done, let them know.

- Search by author and title for other bibliographic records that may have holdable items that would satisfy the patron. Make sure they're the same format!

- <u>If you have the necessary cataloging permissions</u>, merge any bibliographic records that would be considered true duplicates, abiding by your system's merge protocols. All holds will be combined on the resulting merged record. Re-target the hold that was hopeless.

- If merging is not appropriate but another bib record would do, transfer the hold to that record. Re-target the hold that was hopeless.

- If no viable copies are available in your system, alert the patron using whatever communication method you prefer. Cancel the hold.

Notifying the Patron

The method and script are up to you. This is only a sample.

Dear *[patron's name]*,

The material you have requested, *[title]* by *[author]*, is no longer available through *[your library's name]* or the NC Cardinal consortium. If you still need this material, please call *[your library's phone number]* or visit the Library location of your choice to learn about other options for obtaining this material. You may ignore this message if you no longer need the material. We apologize for any inconvenience.

Sincerely,

Optional Tracking

Let's you spot trends and impress your supervisor!

Last Name	First Name	Barcode	TCN	Author	Title	Requested	
XXXXXXXX	Dennette	111250xxxxxxx	3707548	rivera, donald s	hear say	9/8/2017	transferred to another record
XXXXXXXX	Dennette	111250xxxxxxx	5281251	chopra, deepak	super genes	8/30/2017	cancelled, emailed
XXXXXXXX	Jeremy	111250xxxxxxx	3703598	shuvalova, irina nikolaevna	ivan shishkin, 1832 1898	8/31/2017	cancelled, emailed
XXXXXXXX	Jeremy	111250xxxxxxx	3751795		the complete works of yuri norstein	8/31/2017	cancelled, emailed
XXXXXXXX	Elizabeth	111250xxxxxxx	1724677	moore, thomas	the soul of sex	9/7/2017	merged, retargeted
XXXXXXXX	Brenda	111250xxxxxxx	217349	konijnenberg de groot, jo	cellophane creations	9/8/2017	waiting for webinar
XXXXXXXX	Christopher	111250xxxxxxx	3739072	ogilvy, guy	the alchemists kitchen	9/9/2017	waiting for webinar
XXXXXXXX	Darrell	111250xxxxxxx	3258793	de la soul musical group	de la soul is dead	9/13/2017	cancelled, emailed
XXXXXXXX	David	111250xxxxxxx	6469318		graveyard shift	9/9/2017	waiting for webinar
XXXXXXXX	Lance	111250xxxxxxx	6108684	knausgaard, karl ove	my struggle	5/30/2017	merged, retargeted
XXXXXXXX	Coleman	111250xxxxxxx	2886	dunn, judy	the little goat	9/14/2017	cancelled, emailed
XXXXXXXX	Susan	111250xxxxxxx	3857156		scott 2014 specialized catalogue of united stat	9/8/2017	cancelled, emailed
XXXXXXXX	Christopher	111250xxxxxxx	3796552	palmer, robert	best of both worlds	9/4/2017	cancelled, emailed
XXXXXXXX	Marilyn	111250xxxxxxx	2159207	pascal, francine	sweet valley high #25 nowhere to run	9/13/2017	merged, retargeted
XXXXXXXX	Callie	111250xxxxxxx	3749843	east, jacqueline	puppy	9/5/2017	cancelled, snail mailed
XXXXXXXX	Claudia	111250xxxxxxx	649117		french	9/9/2017	merged, retargeted
XXXXXXXX	Tauana	111250xxxxxxx	967267	freudenthal, thor	diary of a wimpy kid welcome to the next grac	7/5/2017	cancelled, emailed
XXXXXXXX	Stefan	111250xxxxxxx	3797012	jacksons musical group	triumph	9/8/2017	cancelled, emailed
XXXXXXXX	Stefan	111250xxxxxxx	3797029	jacksons musical group	goin places	9/8/2017	cancelled, emailed
XXXXXXXX	Robert	111250xxxxxxx	10309877		they drive by night	9/13/2017	cancelled, emailed
XXXXXXXX	Julie	111250xxxxxxx	3090815	nelson, blake	prom anonymous	9/5/2017	merged, retargeted
XXXXXXXX	Roger	111250xxxxxxx	3846426	kenton, stan	stan kenton	8/31/2017	cancelled, emailed
XXXXXXXX	Jeremiah	111250xxxxxxx	3719319		big wish movie	9/7/2017	merged, retargeted
XXXXXXXX	Rachel	111250xxxxxxx	3952711	disney, walt	walt disney mickey meets the giant	9/10/2017	merged, retargeted
XXXXXXXX	Dina	111250xxxxxxx	6472262	browne, jackson	standing in the breach	9/11/2017	merged, retargeted
XXXXXXXX	Andrea	111250xxxxxxx	8170725	wallace, brandon	the journey home	8/8/2017	cancelled, emailed
XXXXXXXX	Sheila	111250xxxxxxx	9217006	ware, ruth	the woman in cabin 10	4/25/2017	cancelled, not viable on electronic resource
XXXXXXXX	Tonya	111250xxxxxxx	4520222	payment, simone	taking your band online	9/8/2017	cancelled, snail mailed
XXXXXXXX	Ryan	111250xxxxxxx	9047683	dunlop, fuchsia	land of plenty	9/10/2017	cancelled, snail mailed
XXXXXXXX	Kerri	111250xxxxxxx	3840811	feder, chris welles	1st grade brain quest	9/8/2017	cancelled, emailed
XXXXXXXX	Claire	111250xxxxxxx	3999612	cohen, barbara	mollys pilgrim	8/29/2017	merged, retargeted
XXXXXXXX	Emily	111250xxxxxxx	4107058	rylant, cynthia	annie and snowball and the cozy nest	9/1/2017	merged, retargeted
XXXXXXXX	William	111250xxxxxxx	1936322	king, jeff	the home distillers workbook	9/6/2017	cancelled, emailed
XXXXXXXX	Melanie	111250xxxxxxx	9130542		the proposal	9/7/2017	merged, retargeted
XXXXXXXX	Gregory	111250xxxxxxx	3751866		posse	9/5/2017	merged, still no copies, cancelled, snail mailed
XXXXXXXX	Cora	111250xxxxxxx	6016136	zolotow, charlotte	the storm book	9/6/2017	merged, retargeted