

Basic Holds Management

Prerequisite: Understanding Holds Ratios. Choose a purchasing threshold to use below.

Expired Titles with Holds

Go to Marketplace → Insights → Current Holds and run a report with the following parameters:

- Run by: Title
- Branch: [your library]
- Weed status: All
- Hold status: Active
- Availability: Available for sale
- Website: Standard and mobile
- Advantage titles only: No

Sort by “Cons ratio” ascending. Add any titles with a cons ratio of “n/a” to a cart to purchase. You may wish to skip preorders, which are in pink rows.

Titles with Large Holds Queues

1. Sort by “Cons Ratio” descending.
2. If a line is pink, it is a preorder. You may decide to skip those lines and move to the next.
3. If the cons ratio is below your threshold, no copies are needed. Skip to the next title.
4. If the cons ratio is above your threshold, purchase additional copies.

This is a simple way to reliably manage holds. However, you may be able to target funds more precisely by applying a custom advantage ratio. Please see the tutorials about managing holds with mental math or a worksheet for more information.