

Basic Notify Me Tags Management

Find titles your patrons want that are not owned anywhere in the consortium.

Patron Interests Manager Plan Setup

This setup process only needs to be completed once, and can create carts regularly.

From Marketplace, go to the Shop menu dropdown, and choose Purchasing Tools. Open Patron Interests Manager, and click CREATE NEW PLAN.

The following settings are suggested, though you may customize as needed:

1. **Plan name:** enter a plan name
2. **Active Notify Me tags:** 2
3. **Which formats should be included?** Check both: Ebook Audiobook
4. **Do you want to limit titles based on price?** Optional; \$200 - \$300 suggested
5. **Should titles in pending carts be included?** Yes
6. **Do you want to include Metered Access titles?** Yes
7. **If a title is available in multiple lending models:** Add the title in the OC/OU model.
8. **If a title is available in multiple Metered Access lending models:** Add the title under the model with the least amount of time or checkouts.
9. **Do you want to include abridged audiobooks?** Member's choice; "Yes" suggested
10. **Do you want to include preorder titles?** Member's choice; "No" suggested
11. **Should weeded titles be included?** Yes
12. **Do you want to exclude certain publishers?** Traditional publishers and indie authors
13. **Do you want to exclude certain audiences?** Include all (default)
14. **Do you want to exclude certain languages?** Include only English; or include additional languages as appropriate to your community (such as "Spanish; Castilian").
15. **Do you want to exclude certain Advantage accounts?** Include only your ADV account; check this setting periodically and remove any new members that are added.
16. **Do you want to generate carts automatically?** "Yes" recommended. If "No", this list must be run manually. If "Yes", complete the following:
 - a. **How often do you want a cart created?** Once a week
 - b. **When do you want to generate a cart for the first time?** Choose a date
 - c. **Do you want to limit how much you spend per cart?** No (review cart & limit manually)
 - d. **Do you want to exclude titles that have previously been in a Patron Interests Manager cart?** No
 - e. **How many copies of each title do you want to add to carts?** 1
 - f. **Cart name:** Enter a cart name
 - g. **Internal purchase order ID:** Optional; give PO if desired
17. Click Save.

Review and Purchase Cart

Each week, review and purchase the cart created using the steps below as a guideline.

1. Have a weekly budget in mind for Notify Me tags.
2. Open the Patron Interests Manager cart and click ADD/REMOVE COLUMNS. The following columns are suggested to add/enable:
 - Format
 - Series (optional, see below)
 - Lending model
 - Street (optional, see below)
 - Cons CPC*
 - Adv CPC* (only if your library uses CPC)
 - Cons MA*
 - Adv MA*
 - Cons OC/OU*
 - Adv OC/OU*
 - Adv Plus shared*
 - Active Notify Me tags
3. Sort descending by each of the holdings columns (starred) in turn. Delete any rows from the cart for which there are already holdings.
4. Sort ascending by Active Notify Me tags. Delete any rows that fall below the number of copies you chose in step #2 in the Patron Interests Manager Plan setup above.
5. Remove titles, if needed, to stay within your weekly budget. Suggested considerations:
 - Active Notify Me tags - more tags are a higher priority
 - Lending Model - prioritize more effective or persistent lending models
 - Cost - you can afford more titles (and satisfy more patrons) if titles cost less
 - Series - consider filling in series gaps
 - Street Date - you may wish to prioritize older or newer titles
6. Before ordering the cart, you may need to unweed certain titles.

Only one copy (the first copy) is suggested to be purchased from Notify Me tags. Any additional needed copies will be discovered through holds management. Please see related tutorials.

This process doesn't find many titles. How can I find more?

While this is a good starting point for addressing patron interest, a large majority of titles will only have one tag, so you will still miss most of the titles your patrons are interested in. If you'd like to consider sustainably purchasing more of these single-tagged titles, please see the tutorial about purchasing additional Notify Me titles.