

Holds Management Using Worksheets

Prerequisites: Familiarity with spreadsheets, Batch Ordering, & Understanding Holds Ratios. Please also choose a purchasing threshold to use below.

Create a Worksheet

1. Go to Insights, and run a Current Holds report with the following parameters:
 - Run by: Title
 - Branch: [your advantage library]
 - Weed status: All
 - Hold status: Active
 - Availability: Available for sale
 - Website: Standard and mobile
 - Advantage titles only: No (unchecked)
2. Click "Create Worksheet", and then download and open the spreadsheet.
3. If you don't want preorders, sort "Preorder" descending and remove rows with "Yes".
4. Sort by "Cons ratio" ascending, and delete rows less than your purchasing threshold.
5. **Don't delete "n/a" rows!** Leave these expired titles here so they may be purchased.

Create a New Advantage Ratio

Highlight "Adv ratio" column and press delete. In the top cell, enter the formula for one of the following adv ratios: a simple holds ratio (easier), or an active holds ratio (more accurate).

Simple holds ratio: $Adv\ holds \div Adv\ own$. This includes suspended holds. See below:

M	N	O	P	Q	R	S
Adv holds	Cons ratio	Adv ratio	All susper	Adv suspe	Cons own	Adv own
1	0.46	=M2/S2	0	0	2	1

Active holds ratio: $(Adv\ holds - Adv\ suspended\ holds) \div Adv\ own$. This excludes suspended holds. Be sure to include the parentheses in the formula! See below:

M	N	O	P	Q	R	S
Adv holds	Cons ratio	Adv ratio	All susper	Adv suspe	Cons own	Adv own
1	0.46	=(M2-Q2)/S2		0	2	1

Once the formula is entered, drag the formula down to fill the "Adv ratio" column.

Titles with Large Holds Queues

Sort by "Adv ratio" ascending and delete any rows with an adv ratio below your threshold. Do not delete rows with #DIV/0!; this just means you don't own any copies. All rows remaining in the spreadsheet may be batch-ordered.