

Problems with Purchasing Tools

None of the tools listed below are recommended by IDL for use in managing holds.

Hold Manager

The primary weakness of this tool comes in the very first criterion where we are given the choice: “Do you want to fill holds based on the number of holds or by holds ratio?”

By holds ratio: In this case, “holds ratio” refers to the Marketplace adv ratio, which does not provide a consistent basis of comparison. Please see Understanding Holds Ratios for more details about why this ratio is not a reliable basis for comparison.

By total holds: The examples below demonstrate that total holds alone cannot tell an accurate story of which titles are needed.

Hold Manager Parameter	Meets Criteria (appears in cart)	Does Not Meet Criteria (does not appear in cart)
Total Holds = 10	12 holds : 4 copies (ratio 3:1)	9 holds : 1 copy (ratio 9:1)
Total Holds = 5	6 holds : 3 copies (ratio 2:1)	5 holds : 0 copies (ratio 5:0)
Total Holds = 1	This <i>should</i> include all titles with holds, but in practice, it does not.	

Metered Access Manager

There are two main problems with this tool:

Not Patron-Focused: This tool fails to find most of the expired titles your patrons have on hold because it only finds expired titles you own. Most of your patron’s holds belong to other libraries.

Availability: This tool fails to consider the availability of consortially-owned copies. Many of the titles in the cart may not need to be purchased because a copy is already available.

“Convert to new cart” from Current Holds Report

The Current Holds report itself is very useful. However, the “Convert to new cart” tool presents several problems, depending on which “Include titles based on” option you choose:

All holds or Adv holds: Please see the Holds Manager discussion above “By total holds”.

Cons ratio: Titles are not limited to just the titles with holds from your patrons. This results in poorly targeted funds because it may include titles with many consortial holds, but none from your patrons. It may also exclude the titles your patrons want the most.

Adv ratio: Please see Understanding Holds Ratios to understand why adv ratio is unreliable.

1st active hold: Suspended holds and preorders are not excluded, making this date unreliable.

In general: Carts created do not exclude preorders which can make targeting funds difficult.