

Holds/Request Reports.

There are four options for reporting on Requests or Holds– none of them are perfect for our use-- for pulling, checking out and delivering requested items to the individual homerooms.

Option #1 Reports > Library Reports > Holds

Not sortable – no homeroom information in printable version.

Can click on eye to see student's homeroom.

[Customize View] [Printable](#)

Local Requests ?

Local Materials Ready for Patron ?

Status	Patron	Title	Requested	Expires	Priority
Ready	Gregg Heffley	Diary of a wimpy kid : hard luck Details (Copy: QUAR28820 / Call #: F KIN)	2020-09-11	2020-09-29	Standard
Ready	Gregg Heffley	The ultimate player's guide to Minecraft GRAYBIN F MIN Details (Copy: QUAR29877 / Call #:	2020-09-15	2020-09-29	Standard
Ready	A. Student	101 ways to boost your science skills HIR) Details (Copy: QUAR27496 / Call #: 507	2020-09-15	2020-09-29	Standard

Printable.

Option #2 Reports > Library Reports > Hold Notices

Individualized notices (one student/page) – use “Internally” to print – sortable by homeroom – each notice includes all the information you need to pull, checkout and deliver requested items... but there's no way to easily reformat it to reduce paper waste.

Select & sort by from to

Display title for library materials

Message

Distributed Internally Via email

[Run Notices](#)

Sort & Select by homeroom, grade, or HR Teacher.

Choose **Distributed Internally** to print notices rather than email.

Ready Hold Notice

2020-09-16

Quarterway Elementary
H.R. Teacher:
Homeroom: 02
Gregg Heffley
Barcode: TEST000
Gregg Heffley:

Holds ready for pickup			
Title	Call Number	Barcode	Hold Expires
Diary of a wimpy kid : hard luck	F KIN	QUAR28820	2020-09-29
The ultimate player's guide to Minecraft	GRAYBIN F MIN	QUAR29877	2020-09-29

Option #3 Reports > Library Reports > Catalog – Titles & Copies > Title & Copy List.

Produces an Excel spreadsheet of items with Holds with student names and ID#s – no homerooms. Sort by Student, Title, or call number for pulling. (See page 4 for how to combine Option #3 and #4 to produce a spreadsheet that includes homerooms).

Set up your report as seen here.

List library titles & copies....

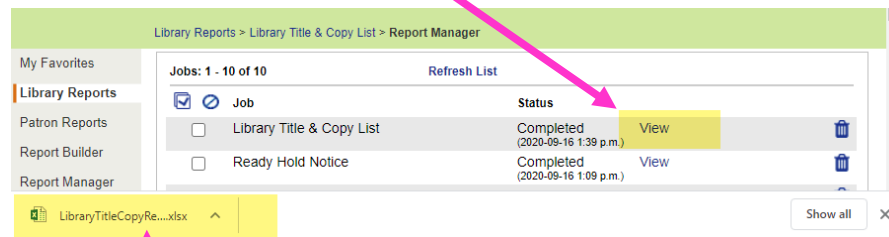
Select By: **Title** from [] to []

Show Titles: **With copies on hold**

Include: Categories
 Circulation statistics

Output: **Microsoft Excel**

When report is finished, click **View**.

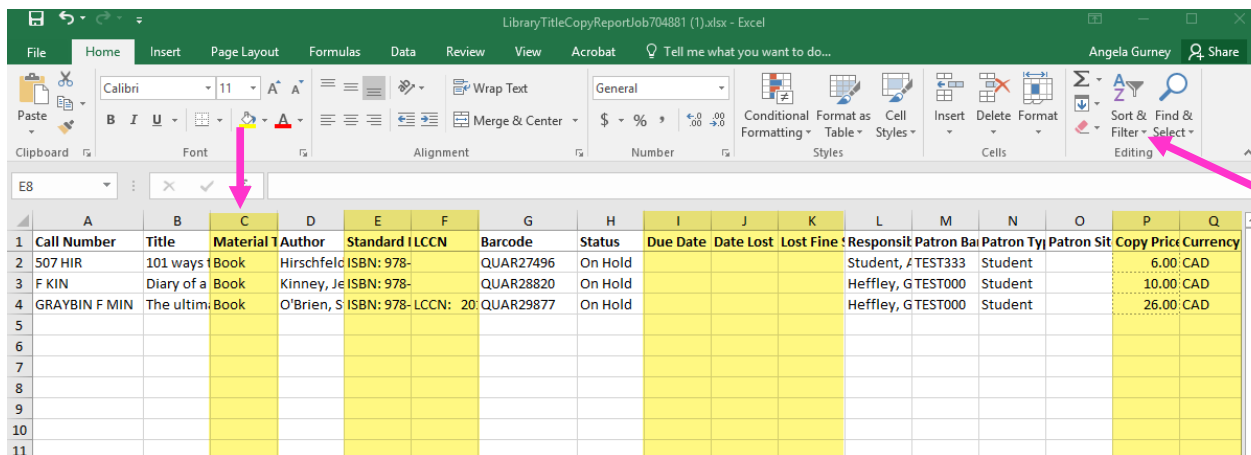


Your report will download. It should show at the bottom of your Chrome browser window. Double click it to open.

The report will open in Microsoft Excel.

To remove unwanted columns...

- click on the letter at the top of the column to highlight the whole column.
- Press **Delete** to remove it.



To sort by a specific column...

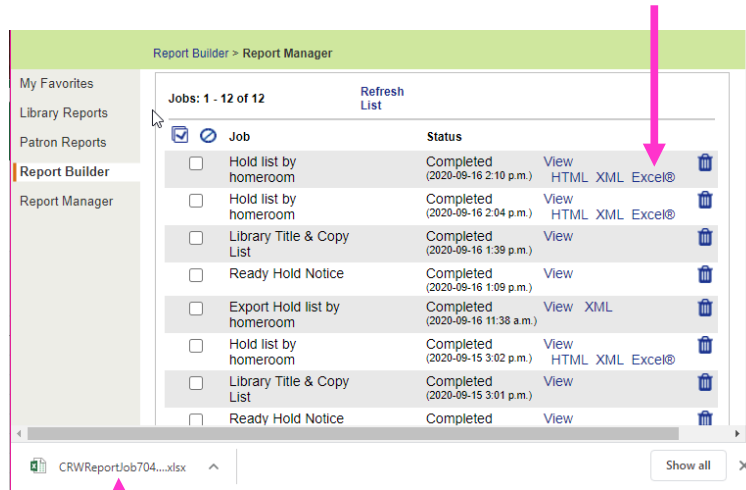
- click on the letter at the top of the column to highlight the whole column.
- Click on **Sort & Filter**.
- When prompted, choose **Expand the selection** and **Sort**.

Option #4 Reports > Report Builder > Hold list by homeroom.

Produces an Excel spreadsheet of requested items with student names, ID#s and homerooms – but no item barcodes or call numbers. (Homeroom information can easily be added to the Spreadsheet produced from Option #3– if you wish).

Run the report.

When report is finished, click **Excel**.



Your report will download. It should show at the bottom of your Chrome browser window. Double click it to open.

The report will open in Microsoft Excel.

	A	B	C	D	E	F	G	H
1	Homeroom	Barcode - Patron	Name - Last	Name - First	Title	Hold/Bool	Requested	
2	02	TEST000	Heffley	Gregg	Diary of a wimpy kid : hard luck	Ready	2020-09-11 14:58:14.0	
3	02	TEST000	Heffley	Gregg	The ultimate player's guide to Minecraft	Ready	2020-09-15 13:56:33.0	
4	02	TEST333	Student	A.	101 ways to boost your science skills	Ready	2020-09-15 14:41:09.0	
5								
6								
7								
8								
9								
10								
11								

Adding Homerooms from Option #4 to Spreadsheet from Option #3

Important: Start off by sorting BOTH spread sheets by the Patron Barcode– smallest to largest. (See *Excel Sorting instructions on page 2.*)

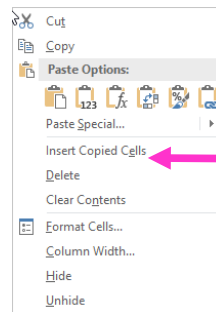
Resulting spreadsheet from Option #3 with extraneous fields removed and sorted smallest to largest by Patron Barcode.

1	Call Number	Title	Author	Barcode	Responsible Patron	Patron Barcode
2	F KIN	Diary of a wimpy kid : hard luck	Kinney, Jeff,	QUAR28820	Heffley, Gregg	TEST000
3	GRAYBIN F MIN	The ultimate player's guide to Minecraft	O'Brien, Stephen J., 1969-	QUAR29877	Heffley, Gregg	TEST000
4	507 HIR	101 ways to boost your science skills	Hirschfeld, Robert, 1942-	QUAR27496	Student, A.	TEST333
5						

Resulting spreadsheet from Option #4 sorted smallest to largest by Patron Barcode.

1	Homeroom	Barcode - Patron	Name - Last	Name - First	Title	Hold/Bool	Requested
2	02	TEST000	Heffley	Gregg	Diary of a wimpy kid : hard luck	Ready	2020-09-11 14:58:14.0
3	02	TEST000	Heffley	Gregg	The ultimate player's guide to Minecraft	Ready	2020-09-15 13:56:33.0
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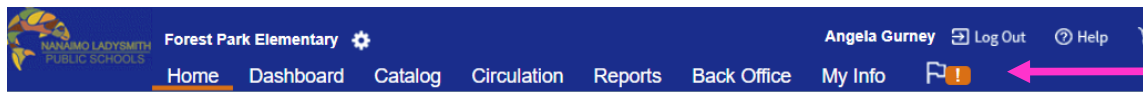
1. Highlight column A (Homeroom) and column B (Barcode – Patron) on the spreadsheet from Option #4.
2. Type **Ctrl+C** to copy.
3. **Right-mouse-click** on the first empty column in the spreadsheet from Option #3.
4. Select **“Insert Copied Cells”**.
5. Double check that the Patron barcodes match in both fields.



1	Call Number	Title	Author	Barcode	Responsible Patron	Patron Barcode	Homeroom	Barcode - Patron
2	F KIN	Diary of a wimpy kid : hard luck	Kinney, Jeff,	QUAR28820	Heffley, Gregg	TEST000	02	TEST000
3	GRAYBIN F MIN	The ultimate player's guide to Minecraft	O'Brien, Stephen J., 1969-	QUAR29877	Heffley, Gregg	TEST000	02	TEST000
4	507 HIR	101 ways to boost your science skills	Hirschfeld, Robert, 1942-	QUAR27496	Student, A.	TEST333	02	TEST333
5								

Managing Holds/Request.

Checking for and “Approving” New Holds/Requests.



Watch for and Click the **flag** to see what requires your attention.

Requests.

Status	Title	Patron	Requested	Expires	
Unapproved	The write genre : classroom activities and mini-lessons that promote writing with clarity, style and flashes of brilliance	FORE TTOC	2017-10-30	2018-01-28	Delete
Unapproved	The maze runner	FORE TTOC	2018-03-06	2018-06-04	Delete

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The ultimate player's guide to Minecraft	GRAYBIN F MIN	QUAR29877	2020-09-29