



EVERGREEN PLUS: PURCHASE ALERT REPORTS

Holds Reports For Collection
Development



Today's Objectives

Weekly purchase alert reports can be used to view titles with active holds for collection development purposes.

At the end of the session, you'll know

- What purchase alert reports are
- The three kinds of reports
- How to use two methods for getting the report data

Essentials

Purchase Alert reports draw together a variety of data points. There are three reports that display the number of holds and the number of holdable copies for any title with more than one hold.

The reports include the title, Title Control Number (TCN or bib ID), format, ISBNs, bib call number (082).

Purchase Alerts Summary	displays total number of active holds and holdable copies in all WLS libraries
Purchase Alerts By Pickup Library	displays the number of active holds and number of holdable copies at the pickup library, and the number of holdable copies in WLS
Purchase Alerts By Patron Library	displays the number of active holds and number of holdable copies at the patron home library, and the number of holdable copies in WLS

Two methods of retrieval

- Method A - Retrieve report output for all libraries and filter in a spreadsheet every week
 - Ideal for Summary Report
 - More work each week
- Method B - Set up reports once, filtered for your library, and then run and retrieve the reports weekly
 - Ideal for Pickup Library and Patron Reports
 - More setup at the beginning, less work each week

Method A

Every week retrieve report output for all libraries and filter in a spreadsheet as needed

Method A – Retrieve report output for all libraries and filter in Excel every week

1. In Evergreen, go to *Administration>Reports*
2. In *Shared Folders*, use the grey arrows to open *Output > evergreen.reports*, and then click *Hold* (*WEST*).
3. In the main window under *Completed Items*, click the box next to the output that you want to see. **If the date you are looking for is still in Pending Items, it hasn't run yet and you will have to wait until it is complete**



Weekly_Reports: created by allisonmidgley

View report output

Limit output to 10 Start Prev [Next](#) Pending Items

Select All None	report	run_time	complete_time	runner	email	folder	error_text	excel_format	html_format	csv_format
<input type="checkbox"/>	Purchase Alerts by Pickup Library	2019-04-21 18:00		allisonmidgley	amidgley@wlsmail.org	41		t	t	f
<input type="checkbox"/>	Weekly Purchase Alerts - Summary of Holdable Copies and Holds	2019-04-19 18:00		allisonmidgley	amidgley@wlsmail.org	41		t	t	f

Limit output to 10 Completed Items

Select All None	report	run_time	complete_time	runner	email	folder	error_text	excel_format	html_format	csv_format
<input type="checkbox"/>	Weekly Purchase Alerts - Summary of Holdable Copies and Holds	2019-04-18 18:00	2019-04-18 18:00	allisonmidgley	amidgley@wlsmail.org	41		t	t	f
<input type="checkbox"/>	Weekly Purchase Alerts - Summary of Holdable Copies and Holds	2019-04-17 18:00	2019-04-17 18:00	allisonmidgley	amidgley@wlsmail.org	41		t	t	f

Method A – Retrieve output, open and format in a spreadsheet

1. Verify that the dropdown at the top of the aqua window says *View report output*, and click *Submit*.
A pop-up window will open.
2. Click the *Excel Output* link. The file will download.
3. Open it in Excel.
4. Resize columns as needed and configure the report for best use.
 1. For the **Summary report**, sort by Number of Holds in Largest to Smallest order.
 2. For **Alerts By Pickup Library or Alerts By Patron Library**,
Go to Sort & Filter>Filter. Filter by your library
Sort by Active Holds column, Largest to Smallest
5. Print or save as needed.

Method B

- Set up reports once, filtered for your library, then run and retrieve the reports weekly
- Pickup Library and Patron Reports

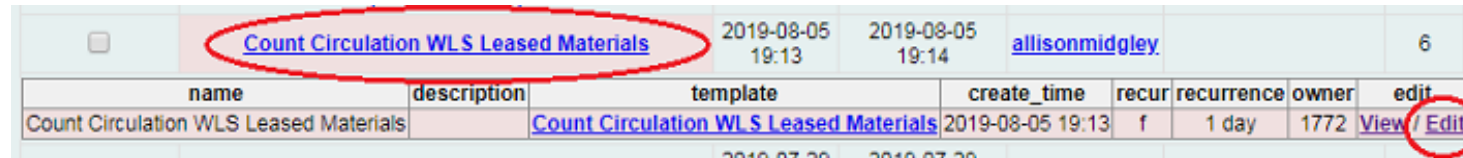
First Access – clone the template and test the report

1. Go to *Shared Folders>Templates>evergreen.reports(WEST)>WLS Shared Report Templates>Holds*
2. Clone the desired template to your own folders. **It is very important that you clone to your own folders to prevent possible loss of access later if templates change.**
3. Run a test report to make sure that the output is as expected.
 1. Enter a Report Name
 2. Choose a Report Definition folder.
 3. In the filter, choose your library.
 4. In Output Options, deselect *Bar Charts*.
 5. Select *Run as soon as possible* and choose an Output Folder.
 6. Click *Save Report*.
4. When it's finished, retrieve the output and verify the data.

First Access – set up the report to run with recurrence - start and set filters

If the output is as expected, set up the recurrence.

1. From the finished output, click on the Name of the report. A pink box displays.
2. In the right side of the pink box, click Edit.



name	description	template	create_time	recur	recurrence	owner	edit
Count Circulation WLS Leased Materials		Count Circulation WLS Leased Materials	2019-08-05 19:13	f	1 day	1772	View / Edit

3. Enter a new, unique name
4. Verify that the Report Definition folder, filter, and Output Options are filled out correctly.

First Access – set up the report to run with recurrence – set recurrence

1. Select the Recurring Report check-box and set the Recurrence Interval
 1. Choose a numerical frequency
 2. Choose the type of interval [usually Week(s)]
2. Select the date box and enter the next date you want the report to run in **YYYY-MM-DD format** and choose a time. This will be the day and time when the report will run weekly.
3. Enter an email address to receive a completion notification. When you receive it, go to Evergreen Reports outputs to retrieve the report.
4. Verify the Report Output folder.
5. Click *Save as New*. An Action Succeeded dialog box displays.
6. Click OK

The screenshot shows a configuration window for a recurring report. The 'Recurring Report' checkbox is checked. The 'Recurrence Interval' is set to '1' with a dropdown arrow, and the unit is 'Weeks(s)'. The 'Run as soon as possible' checkbox is unchecked. The start date is '2022-03-18' and the time is '10 AM'. The email address for completion notifications is 'amidgley@wlsmail.org'. The 'Selected Folder' is 'Class A'. A tree view on the right shows the folder structure under 'Class A', including 'Output Folders', 'Library Holds', 'Library Bills', 'Library Circulation', 'Library Users', 'Library Collections', 'Sys_Admin', 'Weekly_Reports', 'WLS Shared Report Output', 'WLS-HQ', 'Workups', 'Acquisitions', and 'Class A'. The 'WLS Shared Report Output' folder is selected. At the bottom, there are three buttons: 'Save Report', 'Save As New', and 'Cancel'.

Every week, when the report runs

1. Go to *My Folders>Outputs>your output subfolder*.
2. Click the box next to the output that you want to see. **If the date you are looking for is still in Pending Items, it hasn't run yet and you will have to wait until it is complete.**
3. Verify *View the report output*, click *Submit*, and open in Excel.
4. Sort by Active Holds column, Largest to Smallest.

Patron Library	Title	Author	Record ID	ISBN	Bib Format	Bib Call Number	Active Holds at Home Library	Holdable Copy Count at Home Library	Holdable Copy Count Everywhere
POR	The Paris Apartment	Foley, Lucy	5205841	{"0063003058 : HRD"} book		813	5	1	58
POR	The seven husbands	Reid, Taylor Jenkins	4051359	{"9781683244646 : "} lpbook		813 6	5	1	3
POR	Verity	Hoover, Colleen	5102012	{"1538724731,978153"} book		813 6	5	1	32
POR	Beautiful	Steel, Danielle	5215774	{"1984821644 : HRD"} book		813	4	0	3
POR	House of Gucci		5218753		dvd	791 43 72	4	1	49
POR	Sing 2		5220777		dvd	791 43 72	4	0	2
POR	Belfast		5218938		dvd	791 43 72	3	1	34
POR	Black cake : a novel	Wilkerson, Charmain	5204171	{"0593358333 : HRD"} book		813 6	3	1	45
POR	It ends with us	Hoover, Colleen	4004337	{"9781982143657 (pb"} book		813 6	3	1	67
POR	Nightmare alley		5219520		dvd	791 43 72	3	0	4
POR	The 355		5220779		dvd	791 43 72	3	1	12

Stopping or Changing a Recurring Report

Sometimes you may wish to stop or make changes to a recurring report, e.g. the recurrence interval, generation date, email address to receive completion email, output format/folder or even filter values (such as the number of days overdue).

- Use the existing report and the steps above to set up a new recurring report with the desired changes.
- **Make sure that you have local report outputs.**

Delete the current report from the report folder.

**** Deleting a report also deletes all output associated with it.****

Help and Links

- [Purchase Alert Reports on the IT Wiki](#)
- [Evergreen Reports Essentials on the IT Wiki](#)
- support@wlsmail.org

- Allison Midgley
training@wlsmail.org

