

How Picklists Work: a Review April, 2021

RSA runs the **List Onshelf Items with Holds** report five times a day, at 5:00am, 10:00am, 12:00pm, 2:00pm, and 4:00pm. This report is what identifies items that need to be pulled from a library's shelf either to fill holds for pickup at that location or to be transited to another library. To put it another way, this report determines which items appear on your library's picklist or in your library's Onshelf Items Wizard.

Originally, this report only ran once a day, first thing in the morning. RSA later added the noon run of the report to catch holds that are placed later in the day. At the beginning of the pandemic, RSA added the 4:00pm run of the picklist to assist libraries who are relying on holds being placed to pull materials for curbside pickup. This 4:00pm picklist was not being emailed out to members. We have now determined that continuing to run this afternoon picklist will continue for the foreseeable future, and this report is now being delivered to library Gmail accounts like the other two picklists. Effective April 2021, two additional picklist reports have been scheduled for 10:00am and 2:00pm which are ONLY updating the Onshelf Items Wizard and are NOT being emailed.

We ask that all RSA member libraries who share materials pull picklist items at least once a day when they are open. If your library misses a picklist, we ask that you do not go back and "make up" missed picklists. Simply print out the most recent picklist (or use the Onshelf Items Wizard) and pull from that list. Please do not feel obligated to pull items from your picklist every time that the reports run. This is a tool to assist the libraries who are relying on the Onshelf Items Wizard to identify holds for local pickup.

Please note that new hold items are only added to your library's **Onshelf Items Wizard** when the reports run at 5:00am, 10:00am, 12:00pm, 2:00pm, and 4:00pm. Despite this, the list that you see in your library's Onshelf Items Wizard may not exactly match the Picklist that is emailed to your library's Gmail account. While new items are not being added to this list other than at the times the reports are run, items that have already been trapped or transited (either at your library or from another RSA member) will be removed from this list. It is not necessary to compare the two lists.

We have received many questions lately about why an item may not appear on a library's picklist or Onshelf Items Wizard even when the hold is to be picked up at that library and the item is on the shelf at that library. Most of the time, we find that this is because an item had been put into transit to fill the hold from another library before the Onshelf Items with Holds report was run, usually because the item had just been discharged.

Even if your library uses the Onshelf Items Wizard to pull items to fill holds, it is still very important to check your library's **RSA Gmail** daily. This is important not just you may receive other vital communication at this account (questions from other libraries, email failure notices, etc), but because this is also where you will receive your library's Clean Hold Shelf List.

The **Clean Hold Shelf List** lists items that had been requested for pickup at your library but that have either been cancelled or have past their "pickup by" date. These items' status will be automatically updated to INTRANSIT. It is important to promptly remove these items from the hold shelf and to send them either back to the owning library or on to the next patron on the holds queue. If you are unable to locate an item that appears on your library's Clean Hold Shelf list, we recommend that you double check your library's shelves and work areas and/or follow up with the patron who requested the item to confirm whether or not they have, in fact, received the item. If they have, then library staff can go ahead and check the item out to that patron. If you are still unable to

locate the item, please feel free to contact the [RSA Helpdesk](#) for assistance in tracking down the item.