OnShelf Items Wizard Cheat Sheet

Last updated: August 16, 2024

There is a video guide accompanying this cheat sheet which can be found here:
https://www.youtube.com/watch?v=fY3DQ0Kv6xY.

Important Information

- RSA runs the List OnShelf Items with Holds report (pick list) five times a day at 5:00am, 10:00am, 12:00pm, 2:00pm, and 4:00pm.
- Onshelf Items are those items a patron has placed on hold that are on your library's shelf. This is also called the Pick List.
- Items are on only one library's pick list at a time.
- If you have multiple copies of the title on the list, do not send a copy with a different item ID. It may not be from the same bibliographic record and will not fill the hold.
- Check the pick list at least once each day the library is open.
- Items requested by an RSA Union List library or from a SHARE-IL library must be charged out to the library. Do not trap the hold.
- If you are using the Onshelf Items wizard in WorkFlows, you should still check your RSA Gmail daily for the Clean Hold Shelf Report. This report lets you know the holds that have been on your hold shelf for pickup for too long and needs to be set back to the owning library.

How to use the Onshelf Items Wizard

1. Open the Holds group in the Circulation module.
2. Select Onshelf Items to get the current list of your library's items selected to fill holds.
3. To print the list do not use the Print button on the bottom of the screen to print the list. Instead, use one of the methods below to print the list.
   a. If you wish to have a spreadsheet which you can edit and sort, follow these steps:
      i. Select the first line in your list, then hold down the shift key and use the down arrow key to select the entire list.
      ii. Press CTRL+C to copy the selection.
      iii. Open Microsoft Excel.
      iv. Select the first cell in the spreadsheet.
      v. Type CTRL+V to paste the selection into the spreadsheet.
      vi. From there you can sort, format, or edit information.

      b. To generate a printable view of the list from the Onshelf Items wizard (which will not permit editing):
   - i. Go to the File button in the upper left corner of WorkFlows.
   - ii. Select Print Screen from the drop-down menu.
   - iii. The Onshelf Items list will appear in your browser.
   - iv. Select File from the upper left corner.
   - v. Select Print.

4. Take your list to the shelf and search for the items.

5. Scan found requested items in the Trap Holds wizard. Trap Holds is the term that WorkFlows uses for filling the hold for the patron, whether that is putting it as available on your library's hold shelf or putting it into transit to a different library. That hold has been "trapped" for the patron.

6. If the Onshelf Items list is printed with patron information, it must be shredded when complete to protect patron privacy.

7. Once you have trapped the available holds, return to the Onshelf items wizard, and use the buttons at the bottom to mark any unfound items as missing per your library's procedure for missing items.

8. For more information on filling holds, check out the Holds handbook: https://support.librariesofrsa.org/project/holds/