**October 1, 2019** the way we handle pulling holds will change....

You will no longer use the “Pull Holds Report new” to gather the items to fill holds. Instead, you will be using both the Onshelf Items wizard and the Manage Hold Shelf wizard *(you need to use BOTH wizards)*. Please refer to the attached instruction guides for using these wizards.

1. First thing in the morning you will use the Onshelf Items wizard to get your list (and then print) of holds. You can run this wizard as many or as few times as you like throughout the day.
2. Also early in the morning, when handling holds, you will need to use the Manage Hold Shelf wizard to clean up any cancelled, expired, and/or suspended holds *(this takes the place of the expired holds list reports, which will no longer be run)*.

Please note: ALL holds will expire after 7 days for all libraries. However, closed dates for your library will not be included in these 7 days.

Please also note: Patrons are no longer be able to cancel/edit available holds in Enterprise.

A short explanation as to why we are changing the way we handle pulling holds:

We have not been running the Sirsi recommended reports for holds because we didn’t like how the holds were automatically put into transit when the hold expired. Because we have been using our own work-around system we have missed out on using all of the new features Sirsi offers. Not only that, problems with suspended holds would make holds get ‘stuck’. By following the two steps above, we will no longer be having any of these problems happen; and SLC will be doing some things behind-the-scenes as well that will make things run smoother.

Please contact Amy with any questions. Thank you.

***10/10/2019 revision:***

Sirsi made the suggestion that library staff may want to actually run the Manage Hold Shelf wizard 1st and then the Onshelf Items wizard 2nd as this could help make your Onshelf Items wizard list more manageable if you are cleaning up things with the 1st wizard beforehand.

***10/9/2019 email sent about how to handle holds using the Manage Hold Shelf wizard:***

Hello,

There have been questions about the new holds wizards. The biggest question right now is how to process holds when you don’t have the physical items.

Let me start with MeLCats.
When you are in the Manage Hold Shelf wizard, and you have MeLCats in the list (cancelled), click on the “Process Selected Inactive Holds” button at the bottom of the screen, like you have been doing, and put them in transit to SLC. **I have had a long discussion with Sirsi just a few minutes ago about this. For a little while, we may have a lot of them as we are now handling holds correctly. As many of you know, there is a known bug with NCIP when MeLCats are cancelled in DCB. Therefore, these cancelled holds will show up and you will be handling them in the Manage Hold Shelf wizard. I will monitor the pending transits coming to SLC daily to process and then delete these “dummy” MeLCat records/items. Again, Sirsi said after a while there won’t be as many (but as long as there is that bug, there will continue to be some). Please note: this does not mean you handle MeLCats in Workflows. Staff still need to checkin/out MeLCat items in DCB.

If you have SLC shared system library items on the Manage Hold Shelf wizard list that you do not physically have on your shelf, do not process the item and put it in transit since it will say the item is in transit when it is not truly in transit. Instead, call the owning library to do a shelf check. Both libraries can decide how to handle this missing item. Again, these should dwindle the longer we use these wizards and clean up old holds.

Please let me know if you still have any questions about this. The good news is we are all using the wizards correctly....it is just going to take a little time to clean up old holds that needed cleaning up for quite some time.