Pull list

Use the Pull List in WorldShare Circulation to retrieve items that patrons or librarians have requested to be placed on hold or scheduled. The Pull List is the list of items that patrons or librarians have requested to be placed on hold or scheduled.

To complete the hold process, use the Pull List to retrieve items from the shelves, then check them in to change their status to On Hold. See Fulfill holds for more information.

- For more information on statuses, see Item statuses.

Why don't items appear on the Pull List?

- Items shelved at this branch that could fulfill the hold are not currently available (e.g., on loan, in transit, etc.).
- No items available at this branch can fulfill the hold according to your library’s policies.
- For title-level holds, there are no currently available barcoded items that are allowed to fulfill the hold according to the location policy.
- Your branch has previously declined to fulfill the hold.

Some icons and fields need explanation:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barcode</td>
<td>Barcode of the item. A system-generated barcode will be associated with a special request. To fulfill a special request, you must check in the system-generated barcode and then select the barcoded item you wish to use to fulfill the hold.</td>
</tr>
<tr>
<td>Hold Notes</td>
<td>Contains text entered by a patron when placing a hold from WorldCat Discovery.</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
</tr>
<tr>
<td>Alternate Shelf Locations</td>
<td>The selected preferred fulfillment locations for a title.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ICON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can be forwarded ()</td>
<td>Indicates that the item can be forwarded to another branch or institution's pull list.</td>
</tr>
</tbody>
</table>

- If staff at the pickup location forward the hold or there are no items available at the pickup location, then relevant items checked in at any branch or institution could be routed to fulfill the hold.
- The forward option is only available to staff at the pickup location of a title-level hold if the item's Forwarding Policy is set to Prefers Pickup Location if any items are available in the Hold Request Policy in OCLC Service Configuration (WMS Circulation > Hold Request Policy). For more information, see Hold Request Policy.
- You must have the Action column displayed in order to forward items. See Configure columns below for details.
- To forward a hold, choose the Forward option from the Action column.

| Clock () | Indicates that the item has been scheduled. |

| ZFL-Server lending request () | Indicates that the request is a ZFL-Server lending request. |
Use the pull list to retrieve items from shelves

1. In the left panel, click Reports.
2. Click Pull List.
3. Click Refresh to ensure that the Pull List is current.
4. Optional. Click a column heading to change the sort order of the pull list.
5. Optional. Filter requests by Request Type:
   - All (default)
     - You are searching all requests types.
   - Selected
     - Includes the number of selected filters. Options include:
       - Schedules
       - External Requests
6. Click Apply to filter your list or click Reset to clear your filter(s).
7. Click Print to print the Pull List so items on the list can be pulled from the shelves and put in the hold area in your library.
   To add columns to show the last time an item was printed or to allow you to print only selected items, see Configure columns, below.
8. Take the Pull List to the shelves and return to the circulation desk with the items on the list.

You can also use the Digby mobile application to access circulation pull lists sorted by library location. Items scanned are marked as pulled with information about where they need to go next. See Digby app FAQ for more information.

Configure columns

Note: Preferences are retained per your user account.

You can choose the columns that appear on the Pull List.

1. On the left side of the screen, next to the Refresh link, click the User Preferences button (⚙).
2. In the Show Columns window, check or uncheck the columns you want to show or hide.
   The columns you checked or unchecked are shown or hidden.
3. Close the Show Columns window by clicking anywhere outside it.

Print individual pull slips

1. Configure your columns to display the Select for Printing column.
   - The new column displays a checkbox on the far left of the screen and adds a Print option to the bottom of the list.
2. Select the checkbox next to the individual items to be printed or select the top checkbox to select all items.
3. Use the Print option at the bottom of the screen to print each pull list entry individually.
Decline a hold from the Pull List

Use the Decline action if you determine that your branch cannot fulfill a hold because relevant items cannot be found, need repair, or should not be shipped.

Declining the hold will:

- Remove the hold from appearing on your branch's pull list.
- Not allow an item shelved at your branch to fulfill the declined hold.

From the Pull List:

1. Locate the item you wish to decline.
2. From the Action column, select Decline.

If you are the last branch that could fulfill the hold, you will be asked if you would like to delete the hold. This occurs when:

- The patron requested a specific barcoded item.
- The Hold Request Policy prefers the pickup branch, which then declines prior to forwarding.
- The hold has been globally forwarded and your branch is the last with an available, barcoded item that could fulfill the hold.