Schedule items
Last updated: Thu, 30 Jul 2020 17:52:48 GMT

Find information about scheduling an item from a patron account or from a bibliographic record. Schedule item allows circulation staff to schedule the loan of an item from your collection for use on specified days. The system will automatically add the item to your pull list and place an embargo period on the item based on the settings in your scheduling policy. See Scheduling Policy for more information.

For information about placing holds, see Place hold.

Schedule an item from a patron account

1. On the patron record, click the Holds tab.
2. On the Holds tab, open the Scheduled Items section.
3. In the Schedules section bar, click Create Schedule.
4. At the Bib/OCLC # field, type the OCLC control number for the requested item. Go to step 5.
   Or
   If you do not have the OCLC number, click Find.
5. In the Discover Items window, select the index from the Search list, type the search term, and click Search or press .
   ◦ In the search results, click the title of the item to select it.
   ◦ Click Cancel to return to the Create Schedule window.
6. In the Create Schedule window, change the settings as needed.
   ◦ Note (Optional) - Use the Note field, if needed.
   ◦ Pickup - If the patron prefers a different location, select the preferred library from the list.
   ◦ Schedule Date/Time Needed - To set start and end dates for the item's schedule period, type the date or click the calendar buttons and select a date.
7. Click Create Schedule. The item appears:
   ◦ In the Scheduled Items section.
   ◦ On the Pull list.

Edit a scheduled item from a patron account

1. On the left panel, use Assist Patrons to retrieve the patron record. On the Patron record screen, click the Holds tab.
2. On the Holds tab, open the Scheduled Items section.
3. In the Scheduled Items section, in the Title column for the schedule you want to edit, click Edit.
4. In the Edit Schedule window, change the information as needed.
5. Click Save Changes.
Delete a scheduled item from a patron account

1. On the left panel, use Assist Patrons to retrieve the patron record. On the Patron record screen, click the **Holds** tab.
2. On the Holds tab, open the Scheduled Items section.
3. In the Scheduled Items section, in the first column on the left, click the check box in the row of the schedule you want to delete. In the lower left corner, **Delete Schedule** becomes active.
4. In the lower left corner, click **Delete Schedule**. The item is grayed out. The item is removed from the Scheduled Items area after a notification is sent to the patron.

Schedule an item from a bibliographic record

1. On the left panel, use Discover Items to retrieve the item. On the Copies screen, in the upper right corner, click **Schedules**.
2. On the Schedules screen, click **Create Schedule**. The Create Schedule window shows the title of the item and a default Pickup location.
3. In the Create Schedule window, change the settings as needed.
   - **Note (Optional)** - Use the Note field, if needed.
   - **Pickup** - If the patron prefers a different location, select the preferred library from the list.
   - **Schedule Date/Time Needed** - To set start and end dates for the item's schedule period, type the date or click the calendar buttons and select a date.
4. In the **Patron** box, scan or type the patron barcode. To search for a patron, click **Find**. The Search for Patron window appears with the patron listed in the **Patron** box. Click the patron name to select it.
5. Click **Create Schedule**. The item appears:
   - On the Schedules screen
   - On the Pull list (in the Reports section of the Circulation module), marked with a clock icon

Edit a scheduled item from the item record

1. On the Copies screen, in the upper right corner, click **Schedules**.
2. On the Schedules screen, in the Barcode column, click **Edit** under the item barcode.
3. In the Edit Schedule window, change the information as needed.
4. Click **Save Changes**.

Delete a schedule from the item record

1. On the Copies screen, in the upper right corner, click **Schedules**.
2. On the Schedules screen, in the rightmost column, click the check box. In the upper right corner, **Delete Schedule** becomes active.
3. In the upper right corner, click **Delete Schedule**.
   The item is grayed out. The item is removed from the Schedules screen after a notification is sent to the patron.

### Pull report

The **Pull List** is the list of items that patrons or librarians have requested to be placed on hold or scheduled.

1. Ensure the Request Type column is displayed in the Pull List: the clock icon shows it is a scheduled item.
2. When you retrieve an item from the shelf, check in the scheduled item, just as you would for an item on hold.
3. When the scheduled item is ready to pick up, the patron receives an email notice. When the patron comes to pick up the item, you must still check the item out, just as you would for a patron picking up a hold.