Configure recalls
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Discover how to set up recall notices and sequences in OLIB. Recall Notices and Sequences are first configured. These are set up in the same way as for Overdue Notices. First create Notices Reference Data to provide the text of each individual recall notice, for example, a first, second and final recall notice. They should then be ordered into a Sequence.

Overview

1. Go to Alerting> Notices. Here you can copy the Example Recall Notice provided to create your own recall notices.
2. Go to Circulation> Odue/Recall Seqs. Create one or more sequences showing which Notice to send after how many days overdue.
3. Assign Odue/Recall Sequences to the combinations of Users / Copy Categories in the Loan Terms domain.
4. Set up Recalls defaults in the OLIB Defaults (Overdues) domain.
5. For email Alerting to work, configure your SMTP Server name in the System Administration> Server Process Configuration domain.
6. To use SMS Texting, set up the configuration details at either the level of OLIB Defaults, or the users’ Location.

Notices

If you want to use manual recalls it is advisable to set up a manual recall notice for each Location. To use automatic recalls you need to have a sequence of notices. For example if you use both, you might configure:

- Recall Notice (for ad hoc manual recalls)
- First Recall Notice
- Second Recall Notice
- Third Recall Notice

Go to Alerting> Notices and create a copy of the Example Recall Notice as shown in Recall Alerts.

Notice sequences

One or more notices are then combined into Notice Sequences. You outline the sequential order of each notice and the elapsed time between them. This domain is shared with Overdue Sequences. Due to the way Overdue and Recall sequences interact the number of days set for the first step of the process is critical. When Daystart identifies that a copy is overdue (and therefore is due for the initiation of the overdue sequence) it checks to see if there are any outstanding reservations. If there are reservations, instead of initiating the Overdue sequence, it initiates the Recall sequence – and
takes the number of days before the 1st notice in the sequence is sent from the Days you have set in your recall sequence. If you want your 1st recall to go soon after the item is overdue – you should set Days = 1 for the 1st step in the sequence.

1. Go to Circulation Reference Data> Overdue/Recall Sequences.
2. Click New Record to enter a new sequence for Recalls.
3. Enter a unique code in Key ID, and a Short and Long description to identify the sequence, e.g. Standard Recalls.
4. Next click New in the Steps section.
5. In the Overdue Steps screen the Sequence Number is an OLIB generated number for this Sequence.
6. Click Search in the Notice field to select and insert the relevant notice for this sequence. The text of this notice is displayed below for you to view.
7. In the Days field enter the number of days after which you wish the notice to be issued.
8. In Days to Ban enter the number of days before the user is banned.
9. Save the record and repeat the process to add subsequent notices. Click New in the Steps section until you have added all the notices required. In the subsequent steps Days is the number of days since the last step.
10. Once all the notices in the sequence have been added save the Overdues/Recalls Sequence.

Loan Terms parameters

Parameters affecting the behaviour of recalls in OLIB are set in Loan Terms. Use the relevant Loan Terms record to:

- Link to the correct Recall Sequence
- Optionally, also link to a Recall Fine Sequence
- Reduce the loan period for reserved items
- Set number of days an item is on loan before the automatic recall is made

1. Go to Circulation Reference Data> Loan Terms and modify the relevant record.
2. In the Overdues and Recalls section, select the correct Recall Sequence for this Loan Terms record.
3. Optionally, in the Charges section, select the Recall Fine Sequence from the drop down. OLIB automatically uses this to replace the standard fine sequence with a fine sequence used if an overdue item is being recalled.

Note: both the Overdue Sequence and the Recall Sequence need to be set, for OLIB to initiate the Recall Fine Sequence automatically.

4. You may already have configured other settings in Loan Terms that are relevant to Recalls:
   - Use Reduced Loan Days to link recalls to the number of reservations that have been placed against an item, and to then reduce the loan period of the reserved item. Enter the reduced loan period here. This feature also requires configuration in OLIB Defaults: User and Circulation Defaults.
   - Enter the Minimum Loan Days an item is on loan before an automatic recall can be made.
OLIB Defaults

There are Recall defaults to set in OLIB Defaults domain. OLIB can change Copy Statuses when a recall is generated. Configure the following if required:

- **Recall Copy Status**: The status to which the copy should move (from Available) once a recall notice has been generated. Select from Copy Statuses, e.g. RECAL - Recalled. While the item is being recalled, OLIB sets the Copy Status to whichever one is configured here.

- **Long Recall Copy Status**: The status to which the copy should move from (Recalled) once a final recall notice has been generated. Select from Copy Statuses, e.g. LRECL - Overdue Recall.

Closed days

To configure whether or not OLIB should generate recalls on closed days and in holiday periods set the Send Odues/Recalls? parameter in Locations and Calendars.