Scheduling Policy

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Use this screen to create or edit scheduling policies for your items.
To access this screen, sign in Service Configuration, open the WMS Circulation left navigation, select Holds and Schedules, and then select the Scheduling Policy link.

Use this screen to set scheduling policies for items.

Create or edit scheduling policies

1. On the Scheduling Policies screen, click Create New, or click the Policy Name you want to edit.
2. On the Create New or Edit Policy screen, fill in the fields in the order below:
   a. Policy Name: Name of the policy.
   b. Pre-Schedule Embargo Period: Select the length of time for the embargo period that occurs before the scheduled item is checked out.
      ◦ During the selected embargo period, the scheduled item cannot be checked out.
      ◦ For scheduled items checked out before the embargo period, the Loan Period will shorten to accommodate the embargo period.
      ◦ For example, if you select 5 days, then the scheduled item can only be checked out by another patron up until 5 days before the item is scheduled.
   c. Post-Schedule Embargo Period: Select the length of time for the embargo period that occurs after the scheduled item has been returned.
      ◦ During the selected embargo period, the scheduled item cannot be checked out.
      ◦ For example, if you select 2 days, then the scheduled item can only be checked out by another patron once the item is returned and the 2 day period ends.
   d. Automatic Recall Period: If the item is checked out, the amount of time before the item is scheduled that a recall notice will automatically be sent out.
   e. Pull List Period: Amount of time before the item is scheduled that it should appear on the pull list.
   f. Cancel Schedule Notification Policy: Select the cancel schedule notification that will be sent to the patron. Create schedule expiry notifications on the Notification Policy screen.
   g. Pickup Schedule Notification Policy: Select the pickup schedule that will be sent to the patron. Create schedule pickup notifications on the Notification Policy screen.
   h. Placed Schedule Notification Policy: Select the place schedule notification that will be sent to the patron. Create schedule placed notifications on the Notification Policy screen.
3. Click Save.

Copy scheduling policies

1. Click the Policy Name you want to copy.
2. In the top right corner, click **Copy**. The copied policy appears.
3. Enter a policy name and edit any additional fields.
4. Click **Save**.

**Delete scheduling policies**

Policies cannot be deleted if they are in use.

1. Click the **Policy Name** you want to delete.
2. In the top right corner, click **Delete**.
3. On the Confirm window, click **OK**.

**Related policies**

Scheduling Policy depends upon:

- [Notification Policies](#)

Scheduling Policy is used in:

- [Scheduling Policy Map](#)