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](https://help.oclc.org/Library_Management/WorldShare_Circulation/Configuration/OCLC_Service_Configuration_-_...)

Scheduling Policy is used in:

- [Scheduling Policy Map](https://help.oclc.org/Library_Management/WorldShare_Circulation/Configuration/OCLC_Service_Configuration_-_...)

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