

How to Place Recalls

Last updated 3/10/2021

For I-Share libraries, Alma is set so that library staff with appropriate roles can recall an item when the checked-out item is moved to a temporary location. There are four different ways to move the items to trigger a recall:

- Method 1: Recall the item individually as part of a reserve reading list
- Method 2: Recall the item individually by moving it to a temporary location
- Method 3: Recall multiple items as a set
- Method 4: Recall the item individually as part of a work order

If you have only a few items that you are recalling, recalling them individually might be the simplest. For large groups of items, recall them as a set. If you are not recalling items for reserves and want to track the progress of a move, use the work order.

Note: In the Alma Loan Terms of Use (TOU), there is a setting for **Policy Type: Is Recallable**. This setting determines whether patrons are able to recall material *from other patrons* and does not affect whether library staff are able to recall material. As such, the **Is Recallable** setting should be set to *No Recall* in all Loan TOU.

< Terms of Use Management 1 2 Cancel Next

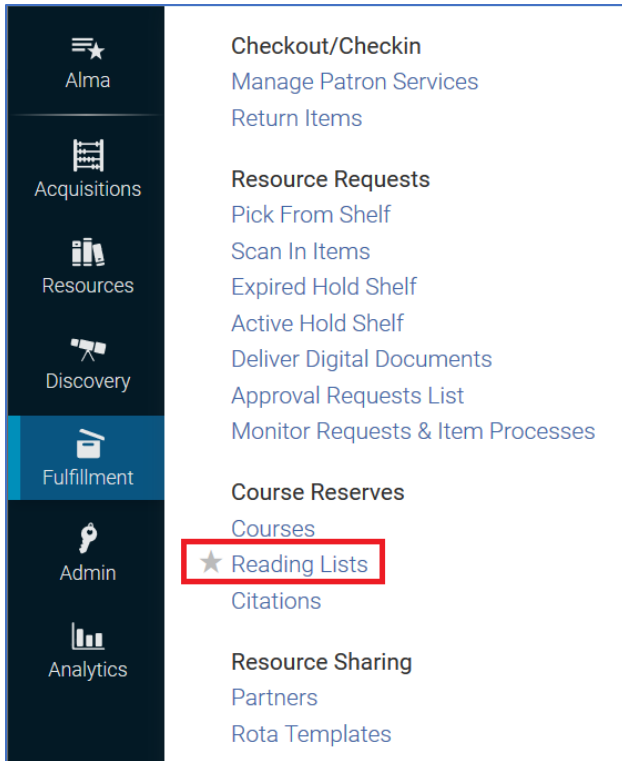
Policy Type	Policy Name
1 Is Loanable	Loanable (Loanable) ...
2 Is Recallable	No Recall (Default Recall is not possible) ...
3 Due Date	16 Week Loan (16 Week Loan) ...
4 Requested Item Due Date	No Requested Due Date (Default value - No Requested) ...
5 Recall Period	2 Week Recall Period (2 Week Recall Period) ...

Method 1: Recall the item individually as part of a reserve reading list

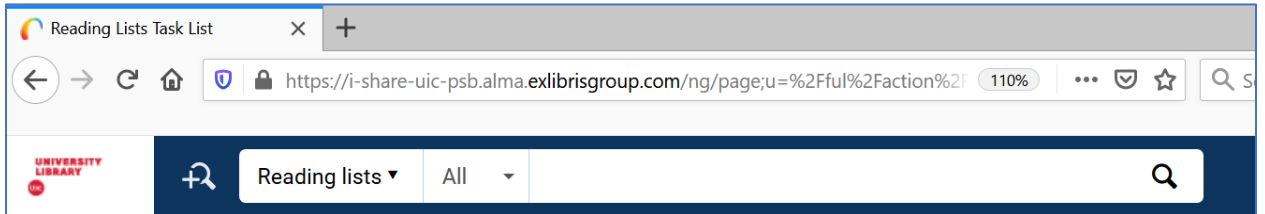
Staff must have these roles to use Method 1: *Course Reserves Manager* or *Course Reserves Operator*, scoped to the appropriate library or institution AND *Requests Operator* scoped to the appropriate library and circulation desk where the reserve work is being completed.

To place a recall for a charged item on a reading list, first add the item to the reading list:

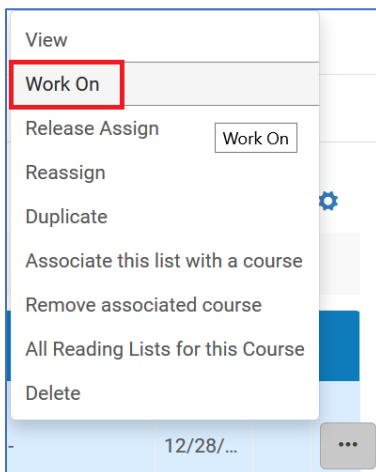
1. Go to **Fulfillment> Course Reserves> Reading Lists** to view the list of reading lists.



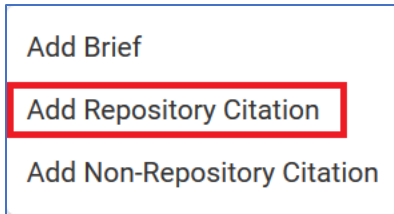
2. Find the reading list you want to add the item to. You may use the **Reading lists** search at the top of the screen.



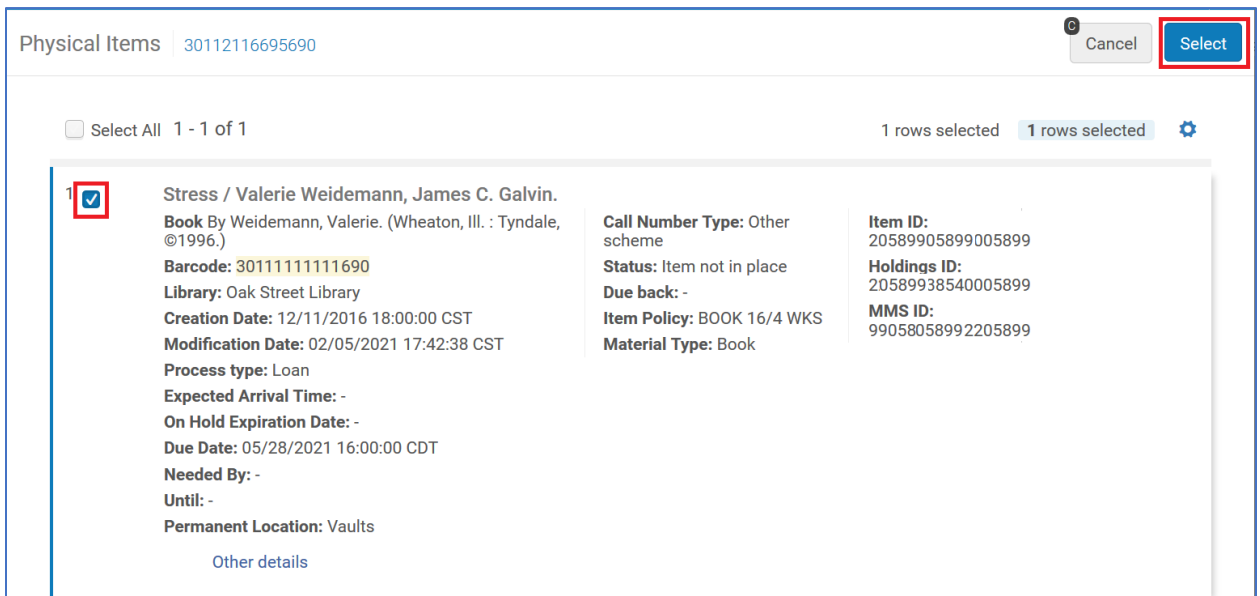
3. Select the **ellipsis> Work on** to open the reading list in edit mode.



4. On the **Citations** tab, select **Add Citation**.
5. Select **Add Repository Citation**.



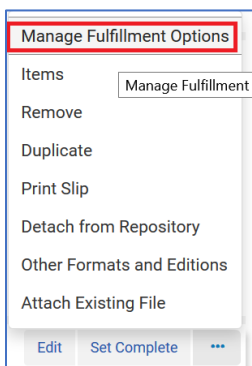
6. This will take you to a screen labeled *Repository Search*. Use the persistent search bar to do a *Physical Items* search for the item.
7. Your search results will display on the screen. Check the check box to select the item and then the **Select** button.



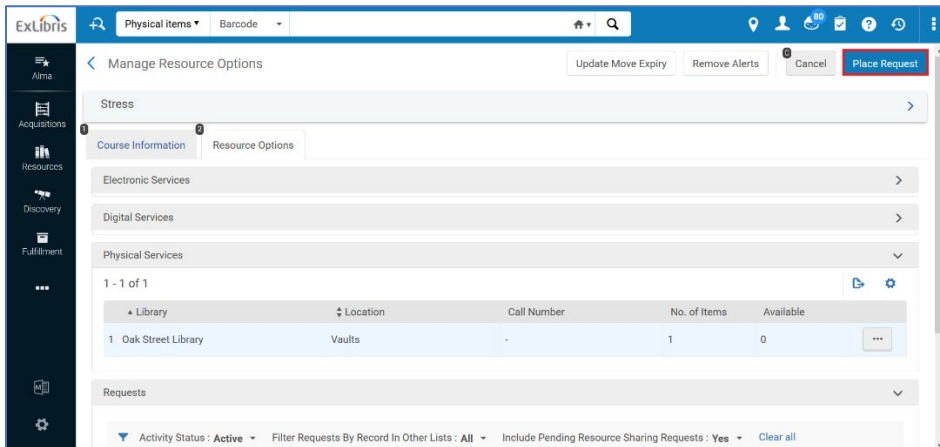
8. The item is now added to the selected Reading List.

For Alma to recall the item from the patron, you must next move the item to the temporary reserve location:

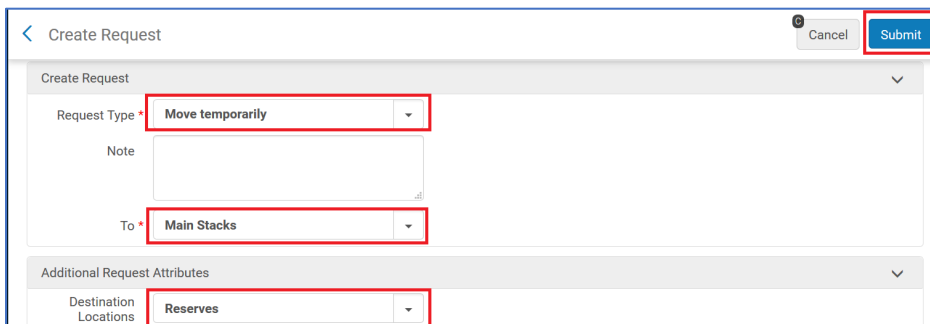
1. Locate the item you wish to recall in the list on the **Citations** tab.
2. Select the **ellipsis**> **Manage Fulfillment Options**.



3. Select the **Place Request** button in the upper right.
If you do not see the **Place Request** button, you may be missing the *Requests Operator* role scoped to the appropriate library and circulation desk where you are working.



4. Select **Move Temporarily** as the request type.
5. Select the appropriate library destination from the **To** drop-down, and reserve location from the **Destination Locations** drop-down list.



6. Select **Submit**.

Alma then places a recall on that item and sends the user the *Loan Status Notice* letter, if enabled at your institution.

Alma does NOT modify/shorten the user’s due date for the recalled item. The due date is reset only if the **Is Recallable** setting in the item’s Terms of Use is Set to *Yes*. However, please leave this setting set to *No*. The *Yes* setting enables patron-initiated recalls, which is not compatible with I-Share resource sharing policies and practices.

However, you can change the date manually.

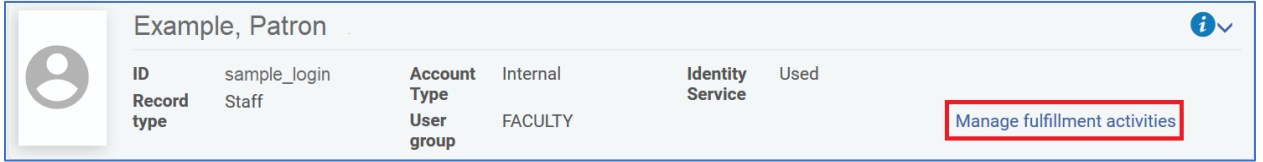
To modify the due date:

Library staff must have the *Circulation Desk Manager* or *Circulation Desk Operator* role scoped to the appropriate library and circulation desk where the due date modification is being completed.

1. Do a *Physical Items* search for the item’s barcode.
2. Locate the item in the search results and select the link for **Process Type: Loan**.

This will open a screen with loan details, including the borrower's name.

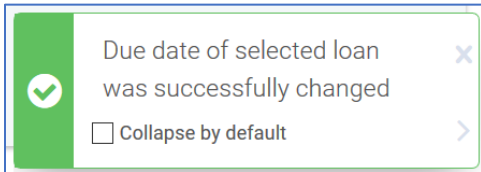
3. Copy the borrower's name and do a *User* search for the patron.
4. Find the user record in the search results and open their record.
5. Select the **Manage Fulfillment Activities** link.



The screenshot shows a user profile card for 'Example, Patron'. The card includes a user icon, a title, and a table of user details. A red box highlights the 'Manage fulfillment activities' button in the bottom right corner.

ID	sample_login	Account Type	Internal	Identity Service	Used
Record type	Staff	User group	FACULTY		

6. Locate the recalled item on the user's **Loans** tab, then select the **ellipsis> Change Due Date**.
7. Enter the new due date and then select the **Change Due Date** button.
8. You should receive confirmation that the due date was changed. Alma also sends the user a second *Loan Status Notice* letter, with the modified due date.



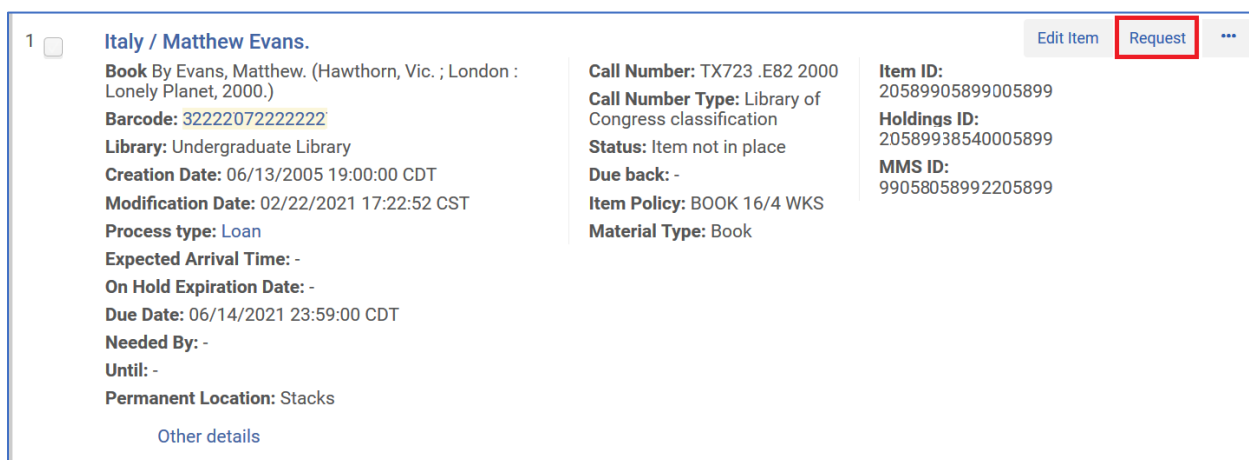
The screenshot shows a green confirmation message box with a checkmark icon. The text reads: 'Due date of selected loan was successfully changed'. Below the message is a checkbox labeled 'Collapse by default'.

Method 2: Recall the item individually by moving it to a temporary location

Staff must have these roles to use Method 2: *Requests Operator* scoped to the appropriate library and circulation desk where the work will be done.

To place a recall for a charged item, regardless of whether it is going on reserve or not:

1. Do a *Physical Items* search for the item's barcode.
2. Locate the item in the search results and select the **Request** button.
 - If you do not have the **Request** button, select the ellipsis.
 - If you still do not have the **Request** button, double-check that you have the *Requests Operator* role, scoped to the appropriate library and circulation desk where you are working.



The screenshot shows an item record for 'Italy / Matthew Evans.' with various metadata fields. The 'Request' button is highlighted with a red box. The fields are as follows:

Book By Evans, Matthew. (Hawthorn, Vic. ; London : Lonely Planet, 2000.)	Call Number: TX723 .E82 2000	Item ID: 20589905899005899
Barcode: 32222072222222	Call Number Type: Library of Congress classification	Holdings ID: 20589938540005899
Library: Undergraduate Library	Status: Item not in place	MMS ID: 99058058992205899
Creation Date: 06/13/2005 19:00:00 CDT	Due back: -	
Modification Date: 02/22/2021 17:22:52 CST	Item Policy: BOOK 16/4 WKS	
Process type: Loan	Material Type: Book	
Expected Arrival Time: -		
On Hold Expiration Date: -		
Due Date: 06/14/2021 23:59:00 CDT		
Needed By: -		
Until: -		
Permanent Location: Stacks		

Other details

3. Select **Move Temporarily** as the request type.
4. Select the appropriate library destination from the **To** drop-down, and reserve location from the **Destination Locations** drop-down list.
5. Select **Submit**.

Alma then places a recall on that item and sends the user the *Loan Status Notice* letter, if enabled at your institution.

Alma does NOT modify/shorten the user's due date for the recalled item. The due date is reset only if the **Is Recallable** setting in the item's Terms of Use is Set to *Yes*. However, please leave this setting set to *No*. The *Yes* setting enables patron-initiated recalls, which is not compatible with I-Share resource sharing policies and practices

However, you can change the date manually.

To modify the due date:

Library staff must have the *Circulation Desk Manager* or *Circulation Desk Operator* role scoped to the appropriate library and circulation desk where the due date modification is being completed.

1. Do a *Physical Items* search for the item's barcode.
2. Locate the item in the search results and select the link for **Process Type: Loan**.
This will open a screen with loan details, including the borrower's name.

3. Copy the borrower's name and do a *User* search for the patron.
4. Find the user record in the search results and open their record.
5. Select the **Manage Fulfillment Activities** link.

ID	sample_login	Account Type	Internal	Identity Service	Used
Record type	Staff	User group	FACULTY		

[Manage fulfillment activities](#)

6. Locate the recalled item on the user's **Loans** tab, then select the **ellipsis> Change Due Date**.
7. Enter the new due date and then select the **Change Due Date** button.
8. You should receive confirmation that the due date was changed. Alma also sends the user a second *Loan Status Notice* letter, with the modified due date.

Due date of selected loan was successfully changed

Collapse by default

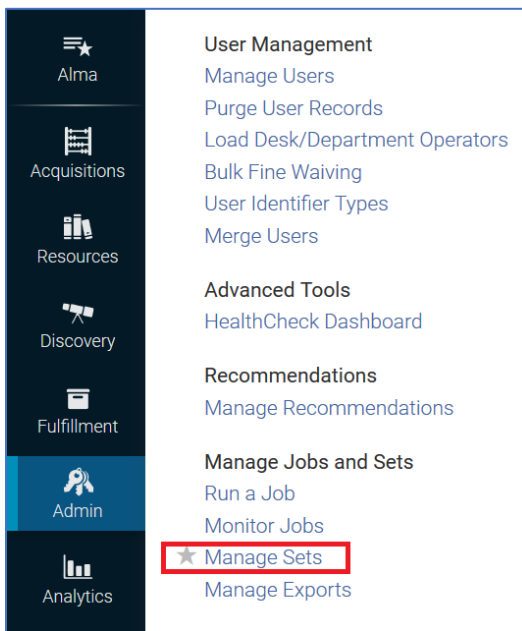
Method 3: Recall multiple items as a set

Staff must have these roles to use Method 3: *Requests Operator* scoped to the appropriate library and circulation desk where the work will be done AND the *Physical Inventory Operator*, *Repository Manager*, or *Repository Administrator*.

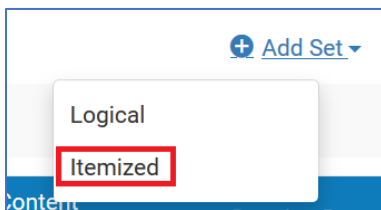
Part 1: To place recalls simultaneously on multiple items, first create the set:

To build a set, staff must have the *Requests Operator* scoped to the appropriate library and circulation desk where the work will be done.

1. Identify the items that you need to recall.
2. Under **Admin> Manage Jobs and Sets>** select **Manage Sets**.

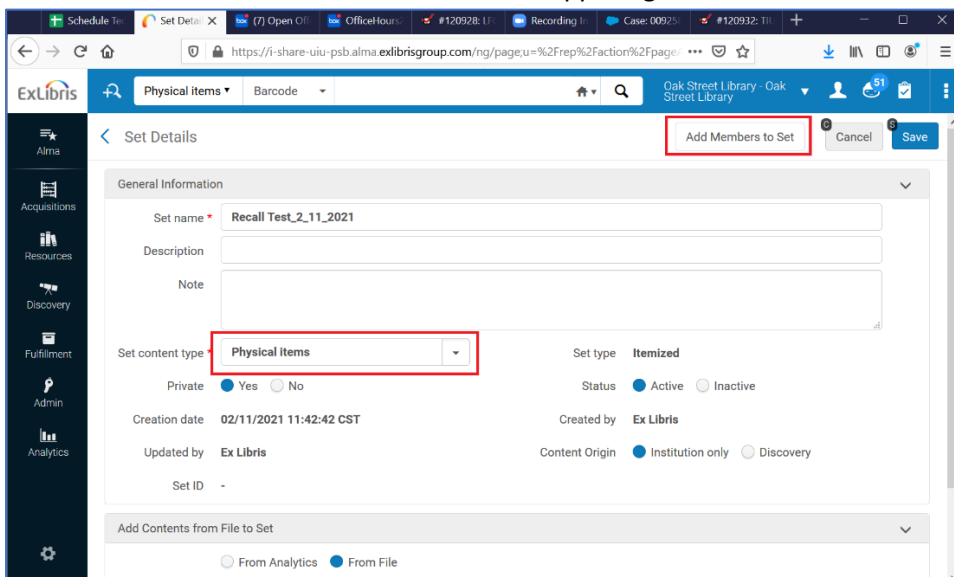


3. Select **Add Set> Itemized** to create the set of items.

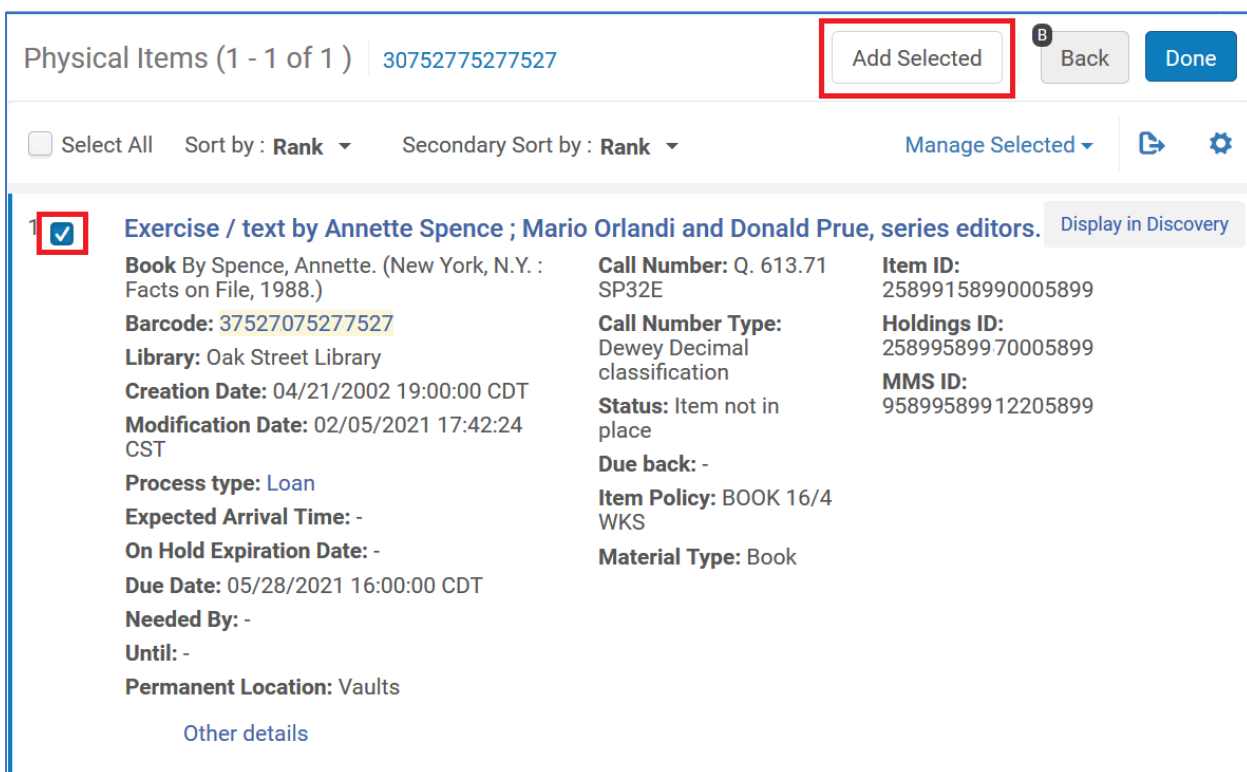


4. The **Set Details** screen will open; enter the set information as follows:
 - **Set Name:** Enter a name for the set.
 - **Description:** Enter a description to help you identify the purpose of this set.
 - **Set Content Type:** Choose *Physical Items*.
 - **Private:** *Yes* means that only you (the logged in operator) can view/use the set; *No* means that others at your institution will be able to view/use the set. Choose the option that best matches your needs.
 - **Content Origin:** Choose *Institution Only*.

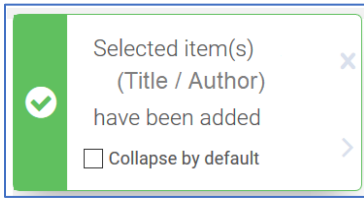
5. Select the **Add Members to Set** button in the upper right.



6. The *Repository Search* page will open.
7. Use the persistent search bar to do a **Physical Items** search for the material you need to recall.
8. Locate the item in the search results and check the check box for the item.
9. Use the **Add Selected** button to add the item to your set.

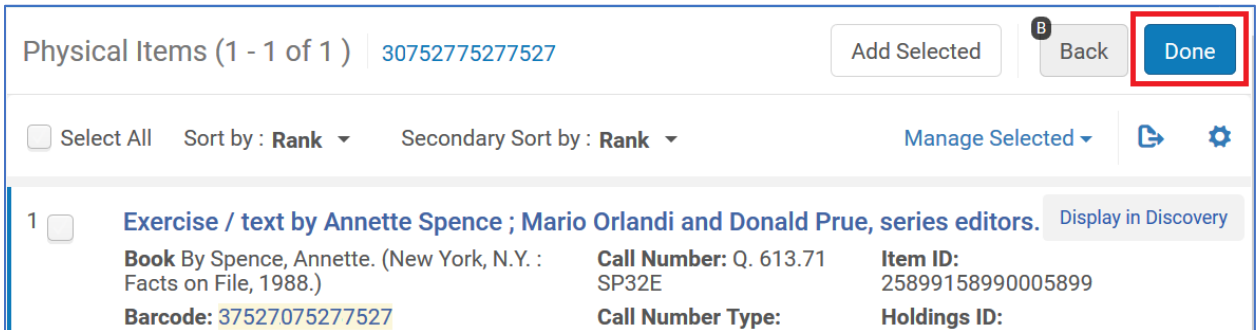


10. You should receive confirmation that the selected item was added to your set.

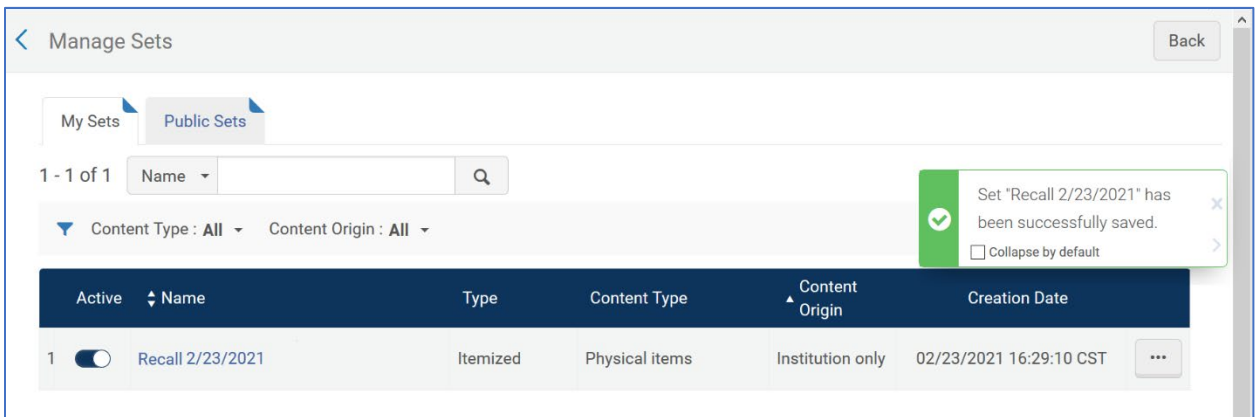


11. Repeat steps 7 through 10 for additional items that you want to add to the set.

12. Select the **Done** button to complete your set.



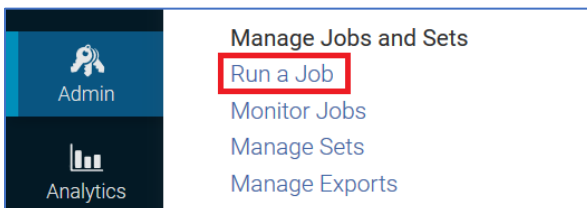
13. You should receive confirmation that your set was successfully saved and Alma will return you to the **Manage Sets** screen.



Part 2: Run the job to move the material and apply the recalls

To run the job, staff must have the *Repository Manager*, or *Repository Administrator* role.

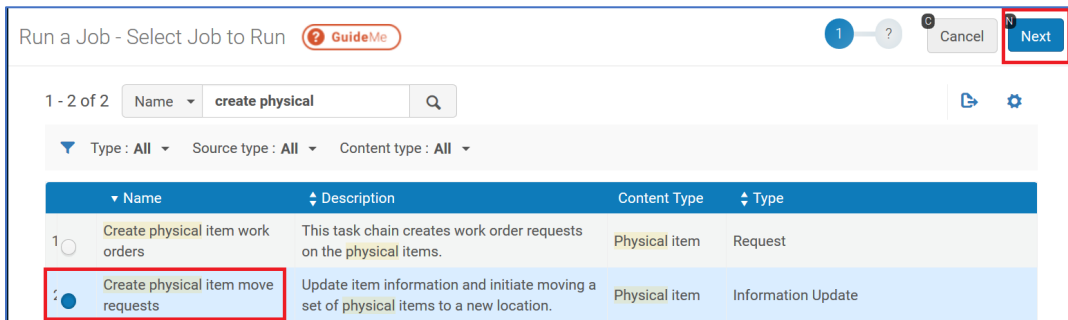
1. Under **Admin**> **Manage Jobs and Sets**> select **Run a Job**.



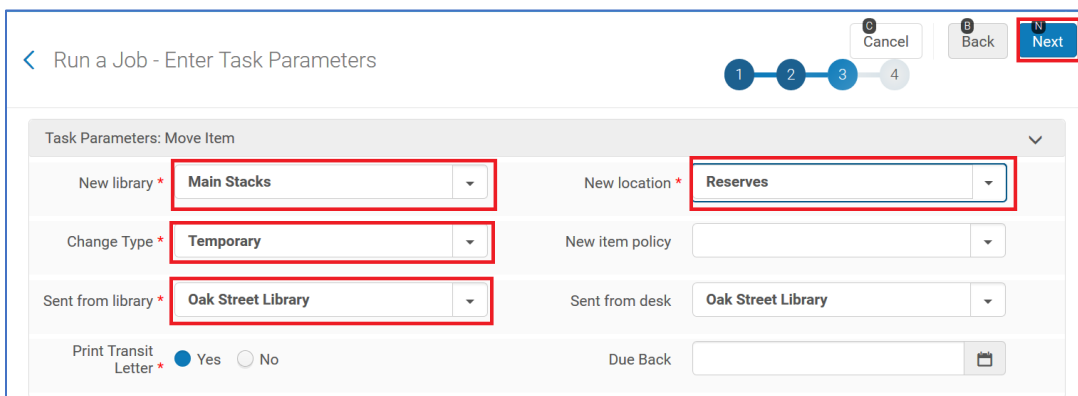
2. The *Run a Job – Select Job to Run* page will open.

3. To filter the list of jobs you are eligible to run, select **Name** from the drop-down, and enter *create physical item move requests* in the search box.

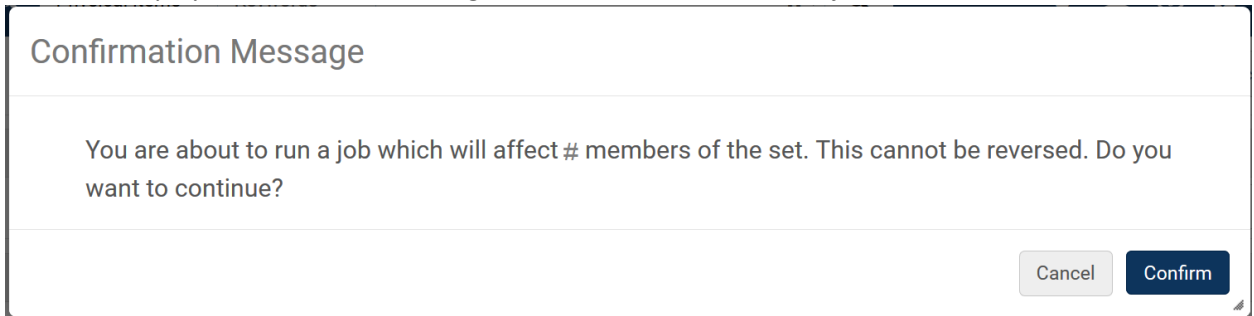
4. Locate the **Create physical item move requests** job in the list.
Select the radio button for that job and select the **Next** button.



5. This will open the *Run a Job - Select Set* page.
6. Locate the set you created in Part 1 of these directions; you can enter your set name in the set search box to help narrow your results.
7. Select the radio button for your set and select the **Next** button.
8. This will open the *Run a Job - Enter Task Parameters* page; enter the job information as follows:
 - **New library:** Enter the library that will manage the recalled items when they are returned by the user; when the items are returned, Alma will prompt library staff to transit the material to this library. This library will show in Alma and Primo VE as the location for the item.
 - **New location:** Enter the location where these recalled materials should prompt to be routed when they are returned by the user. This location will show in Alma and Primo VE as the location for the item.
 - **Change Type:** Select *Temporary*; a permanent change will not trigger the recall.
 - **Sent from library:** Select the library where you are logged in to perform this work. If the items in the set are owned by multiple libraries at your institution, Alma will still create the temporary move request even if the item's location is not the one selected here.
 - **Sent from desk:** Select the primary circulation desk for the library chosen in the **Sent from library** option.
 - **Print Transit Letter:** Since these materials are currently checked out to a patron, you can select *No*.
 - **Due Back:** Leave this setting blank.



9. Select the **Next** button.
10. This will open the *Run a Job – Review and Confirm* page. Review your selections, and then select the **Submit** button to start the job.
11. Alma will display a confirmation message. Select **Confirm** to start the job.



12. To monitor the progress of the job, Under **Admin> Manage Jobs and Sets>** select **Monitor Jobs**. The job will display on the **Running** tab until it completes, after which it will display on the **History** tab. You may use the **Refresh** link to update your screen display.
13. When the job completes, Alma then places a recall on that item, and sends the user the *Loan Status Notice* letter, if enabled at your institution.

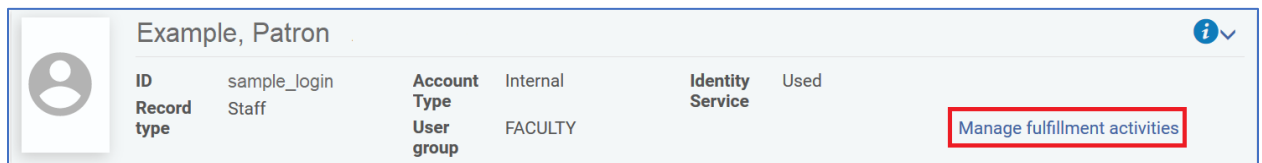
Alma does NOT modify/shorten the user’s due date for the recalled item. The due date is reset only if the **Is Recallable** setting in the item’s Terms of Use is Set to *Yes*. However, please leave this setting set to *No*. The *Yes* setting enables patron-initiated recalls, which is not compatible with I-Share resource sharing policies and practices.

However, you can change the date manually.

To modify the due date:

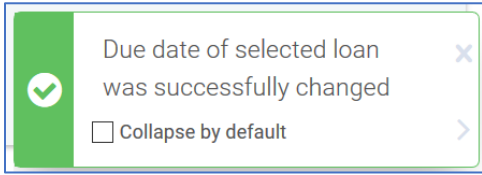
Library staff must have the *Circulation Desk Manager* or *Circulation Desk Operator* role scoped to the appropriate library and circulation desk where the due date modification is being completed.

1. Do a *Physical Items* search for the item’s barcode.
2. Locate the item in the search results and select the link for **Process Type: Loan**. This will open a screen with loan details, including the borrower’s name.
3. Copy the borrower’s name and do a *User* search for the patron.
4. Find the user record in the search results and open their record.
5. Select the **Manage Fulfillment Activities** link.



6. Locate the recalled item on the user’s **Loans** tab, then select the **ellipsis> Change Due Date**.
7. Enter the new due date and then select the **Change Due Date** button.

8. You should receive confirmation that the due date was changed. Alma also sends the user a second *Loan Status Notice* letter, with the modified due date.



Method 4: Recall the item individually as part of a work order

Staff must have these roles to use Method 4: *General System Administrator* is needed to complete the initial setup in Part 1.

A *work order* is an internal library request, which routes physical materials to a specific library department for internal processing by library staff. When an item is sent to a department by a work order, Alma marks the item as not available on the shelf. Staff can then also track the material using staff-assigned statuses.

The first part of the following instructions cover setting up work orders with a standalone department. For instructions how to associate a work order with a circulation desk, see Option 2: Associating a Work Order with a Circulation Desk on page 21.

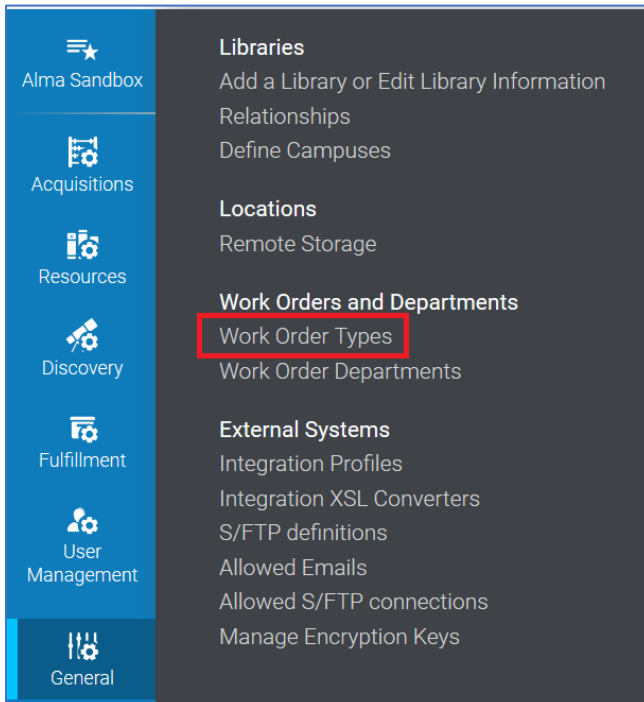
Scenario 1: Setting Up a Work Order with a Separate Department

Part 1: Setting up the work order department for recalls.

Note: The part 1 directions only need to be completed once for your institution by someone with the *General System Administrator* role.

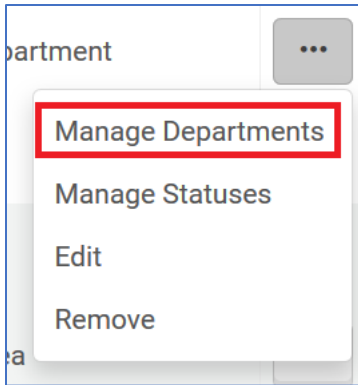
1. In Alma Configuration at the institutional level, under **General > Work Orders and Departments** select **Work Order Types**.

A *work order type* indicates the type of library process to be carried out on a physical resource, such as binding, mending, cataloging, interlibrary loan lending (outside I-Share), or digitization.



- This will open the list of work order types at your institution. Select the option to **Add Work Order Type**.

- This will open a form to create the new work order type; enter the work order type information as follows:
 - Code:** Enter a code to represent the work order type.
 - Set the case of the new code to match that of the other codes already in use by your other work order types already in use- for example, all caps, all lowercase, or title capitalization.
 - Do not use punctuation or spaces.
 - Name:** Enter a name for the work order type.
 - This name may occasionally display to patrons.
 - If you envision using this work order type for tasks in addition to recalls, you will want to choose a more-encompassing/broader name.
 - Example names for work order types created to facilitate material recalls from users include: Circulation Review, Cataloging Review, Library Use, Material Recall, etc.
 - Description:** Enter a brief description for the work order type.
 - Recalls Loans:** Checkbox should be checked.
- Select the **Add Work Order Type** button and note that your work order type is added to the list.
- Select the ellipsis for your new work order type, and then choose **Manage Departments**. A *department* is an area of a library that handles a work order, such as receiving purchased material, binding, fixing worn items, or managing recalled material.



6. This will open the *Department* List. Select the option to **Add Department**.
7. This will open the four-part *Department Details* wizard to create the new work order department.

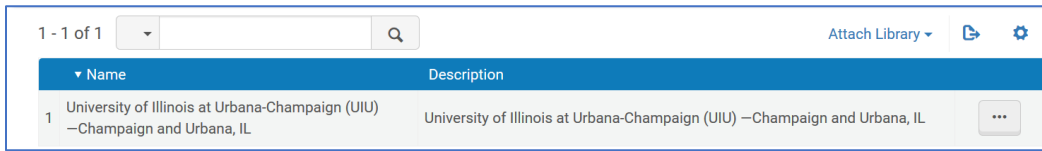
On page one of the wizard, enter the work order department information as follows:

- **Code:** Enter a code for the work order department.
- **Name:** Enter the name for the work order department.
 - This name is what library staff will select when switching their location in Alma to the work order department to process materials for the associated workflows.
 - This is also the name that will display when assigning material to a work order.
 - This name may occasionally display to patrons.
 - If you envision using this work order department for tasks in addition to recalls, you will want to choose a more-encompassing/broader name.
 - Example work order department names for the recall process include: Circulation Review, Fulfillment Processing, Library Staff Review, Technical Processing, etc.
- **Description:** Enter a brief description of the work order department.
- **Work Time (days):** The number of days used to calculate the expiration date that appears on the *Resource Request Monitoring* page for the item being processed.
 - If the field is left blank or set to 0, Alma will use a default of 7 days.
- **Default Printer:** If you want routing slips to print, select a printer.
 - The printer must be configured at the institution level.
 - Note: Routing slips are not consistently printing for work orders.

Code *	recalldept	Name *	Recall Department
Description			
Work Time(days)	0	Map	
Default Printer	Alma Test Circ		
Additional Printers			

8. After filling in the values on the first page of the setup wizard, select the **Next** button.

- Page 2 of the wizard is for the *Served* Libraries. If all of the libraries at your institution can use the work order department, verify that your institution name is listed, and select the **Next** button.



- Page 3 of the wizard is the department’s *Contact Information*. Enter the address, phone number, and email address that should be used for the department and select the **Next** button.
- Page 4 of the wizard is where you can add the library staff members who can process materials in this work order department. Select the option to **Add operators** for the department.

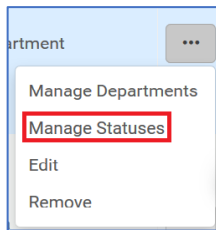
The operators you add to the list receive the *Work Order Operator* role for the department.

Note: if you are one of the operators, you must log out and log back in before using the department.

- Select the **Save** button to complete the wizard and note that your work order department is added to the list.

- Under **General> Work Orders and Departments>** select **Work Order Types**.

- For your new recall work order type, select the **ellipsis> Manage Statuses**.



A *work order status* represents a specific task that makes up the work order type, as managed by the work order department. Each status represents a step in the process performed by library staff, to help track the item’s whereabouts while being worked on in the department. For example, a *Mending work order type* could include the *Work order statuses* of gluing, sewing, rebinding, photocopy page request, erasing, etc.

- This will open the *Work Order Type Statuses* List. Select the option to **Add Status**.
- This will open a form to create the new work order status; enter the work order status information as follows:

- Code:** Enter a code to represent the status.
- Name:** Enter a name for the status.

Example work order status names for the recall process include: Recalled from patron, Recall, Transit for recall, etc.

Code *

transit_to_movers

Name *

Transit to Movers

Description

Add Status

17. Select the **Add Status** button and note that your work order status is added to the list.

Your work order department setup for recalls is complete.

Part 2: Using the work order department to recall items

1. Do a *Physical Items* search for the item you need to recall.
2. Locate the item in the search results and select the **ellipsis> Work Order**.
 - If you do not have the **Work Order** button, double-check that you have the *Work Order Operator* role, scoped to the appropriate work order department.
 - If you still do not have the **Work Order** button, double-check that your search was a *Physical Items* search.

1 <input type="checkbox"/>	Exercise / Don Nardo ; introduction by C. Everett Koop.	Edit Item	Request	...
	Book By Nardo, Don, (New York : Chelsea House Publishers, c1992.)	Call Number: 613.71 N166E	Item ID: 238495671	Work Order
	Barcode: 30112010313044	Call Number Type: Dewey Decimal classification	Holdings ID: 228495671	Holdings
	Library: Oak Street Library	Status: Item not in place	MMS ID: 993417630	Display in Discovery
	Creation Date: 04/21/2002 19:00:00 CDT	Due back: -		Items
	Modification Date: 02/05/2021 17:41:56 CST			
	Process type: Loan			

3. This will open the *Place Item in Process* page.
4. Select the appropriate **Process Type** (aka Work Order Type) and **Managing Department** (aka Work Order Department).
 - Check the checkbox for **Do not pick from shelf**, as this item is already charged to a patron.
 - You may add a note if desired; this note might display to patrons.

Physical items Barcode

Oak Street Library - Oak Street Library

Place Item in Process Cancel Submit

Exercise / Don Nardo ; introduction by C. Everett Koop.

Place Item in Process

Process Type Recall

Do not pick from shelf

Note

Managing Department Recall Department

6. Select the **Submit** button.

Alma then places a recall on that item and sends the user the *Loan Status Notice* letter, if enabled at your institution.

Alma does NOT modify/shorten the user's due date for the recalled item. The due date is reset only if the **Is Recallable** setting in the item's Terms of Use is Set to Yes. However, please leave this setting set to No. The Yes setting enables patron-initiated recalls, which is not compatible with I-Share resource sharing policies and practices

However, you can change the date manually.

To modify the due date:

Library staff must have the *Circulation Desk Manager* or *Circulation Desk Operator* role scoped to the appropriate library and circulation desk where the due date modification is being completed.

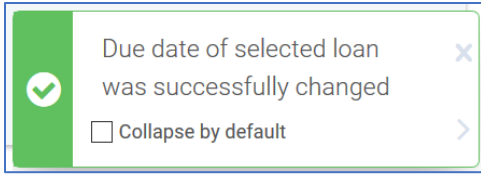
9. Do a Physical Items search for the item's barcode.
10. Locate the item in the search results and select the link for **Process Type: Loan**.
This will open a screen with loan details, including the borrower's name.
11. Copy the borrower's name and do a *User* search for the patron.
12. Find the user record in the search results and open their record.
13. Select the **Manage Fulfillment Activities** link.

Example, Patron

ID	sample_login	Account Type	Internal	Identity Service	Used
Record type	Staff	User group	FACULTY		

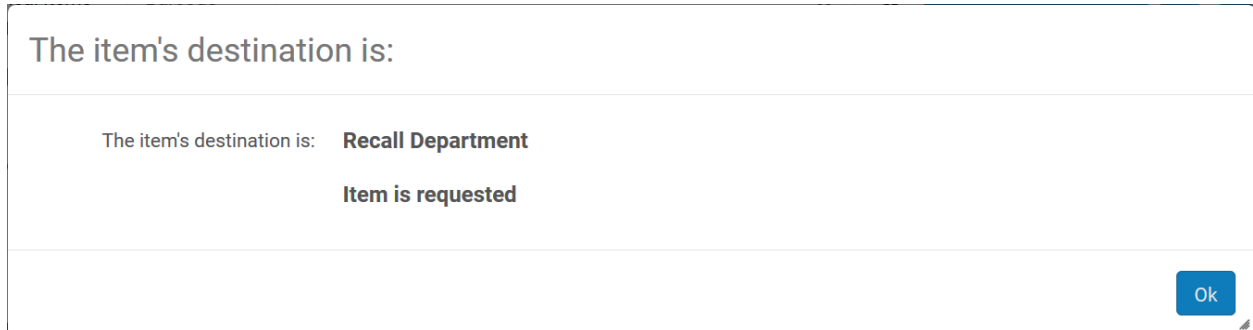
Manage fulfillment activities

14. Locate the recalled item on the user's **Loans** tab, then select the **ellipsis> Change Due Date**.
15. Enter the new due date and then select the **Change Due Date** button.
16. You should receive confirmation that the due date was changed. Alma also sends the user a second *Loan Status Notice* letter, with the modified due date.



Part 3: When the recalled item is returned by the patron

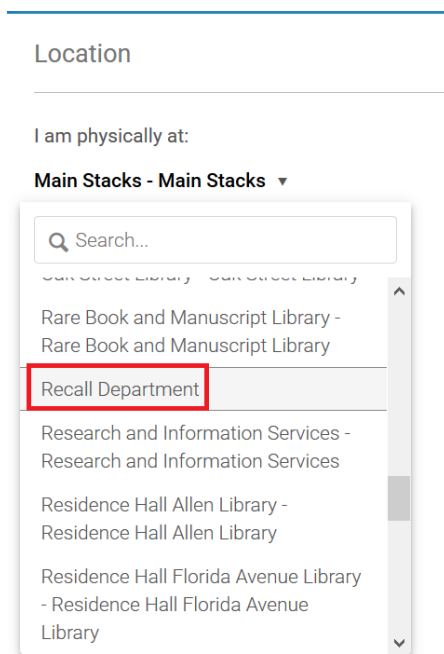
When the patron returns the item, Alma displays a pop-up message indicating that the item is to go to the work order department:



Also, a routing slip will be printed to the work order department. (Note: routing slips are not always printing.)

To process the returned item:

1. Choose the work order department as your location.



If the department doesn't display, check that you are one of the operators for the department. Also, you need to log out and in after adding yourself to the department.

2. Open **Fulfillment> Scan in Items**.

The *Scan In Items* page opens.

3. Enter the details about the item:
 - **Automatically Print Slip:** This setting hasn't been working.
 - **Set Status To:** Select the appropriate status.
 - **Done:** Do not select *Yes* for the first time that you scan the item. You need to scan it twice in the work order department.
 - **Scan Item Barcode:** Enter the item's barcode.
4. Select the **OK** button next to the **Scan Item Barcode** field.
5. When you have finished processing the item, scan in the item again, but this time select *Yes* for **Done**.

The item's status changes to transit for reshelving.

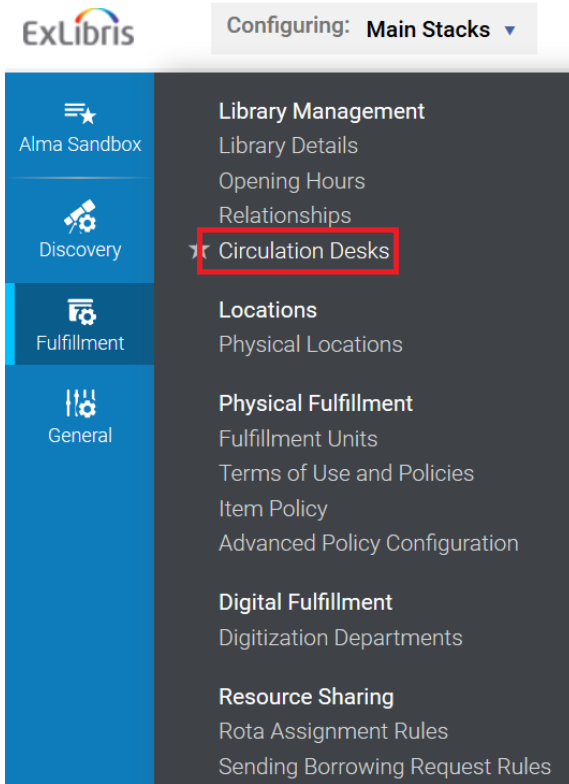
Option 2: Associating a Work Order with a Circulation Desk

You also have the option to associate a work order with a circulation desk. To do so:

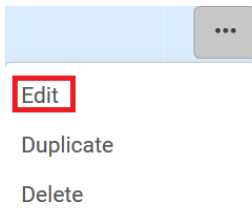
1. Follow the steps on page 21 to create a work order type.
2. You don't need to create a work order department.
3. Follow the directions on page 17 to add one or more work order statuses.
4. Open Alma Configuration.

Verify that Configuration is at the library level.

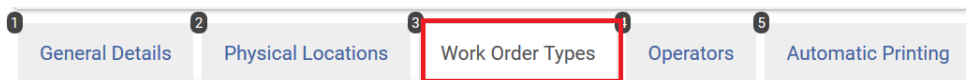
5. Select **Fulfillment> Circulation Desks**.



6. Select the **ellipsis> Edit** by the circulation desk.



7. Select the **Work Order Types** tab.



8. Select **Add work order**.

+ Add work order ▾

Work order type *

Circulation Review ▾

Work order time (days) *

7

Add work order



9. Enter the work order type as follows:
 - **Work order type:** Select the work order type from the list.
 - **Work order time (days):** Enter the amount of time in days that you expect the processing to take.
10. Select the **Add work order** button.
11. Click **Save**.

< Circulation Desk - Work Order Types Cancel Save

You are configuring: **Main Stacks**

Main Stacks >

1 General Details 2 Physical Locations 3 Work Order Types 4 Operators 5 Automatic Printing

+ Add work order ▾  

Work order type	Work order time (days)	
1 Bookstacks Office	1	...
2 Circulation Review	7	...