

**Introduction** The **Recalls** facility in Heritage IV enables you to recall items currently out on loan to readers. There are four methods of recalling items:

1. Recalling individual accessions.
2. Recalling copies of a specific catalogue record.
3. Recalling items on loan to individual readers.
4. Recalling batches of items. For example, recalling all items on loan, all items currently reserved by other readers or all items on loan to readers about to expire.

Please follow the steps below for each type of recall.

### Recalling Individual Accessions

1. Go to **Cataloguing Menu** then **Accession Record**.
2. Enter the accession number of the item you want to recall in the **Accession Number** field.
3. Click on the **Loans** tab. See *fig.1* (page 2).
4. The **Reader Details** field displays the reader who currently has the item on loan. Click on the **Recall Items** button to recall it from this reader.
5. You will be prompted "How would you like the letter to be produced?". Click on either **Email** or **Printed**.

(For instructions on configuring Heritage to send emails please see Heritage Helpsheet HM13 'Setting up the Email Facility').

You will then be prompted that the accession has been noted for recall and that you may print recall letters from the recall menu. See **Printing Recalls** on page 4.

fig.1

## Recalling All Copies of a Catalogue Record

1. Go to **Cataloguing Menu** then **Catalogue Record**.
2. Enter the standard number of the items you want to recall in the **Standard Number** field.
3. Click on the **Other** tab.
4. Click on the **Recall** button.
5. Place a tick in the left hand checkbox against the copies of this item you want to recall, or click on **All** to select all copies of this item, then click on **Ok**. See fig.2 (below).
6. You will be prompted "How would you like the letter to be produced?". Click on either **Email** or **Printed**.

You will then be prompted that the accession has been noted for recall and that you may print recall letters from the recall menu. See **Printing Recalls** on page 4.

Acc. no.	Std. no.	Author	Title
<input checked="" type="checkbox"/> A3	C2	DE BERNIERES	Captain Corelli's Mandolin
<input checked="" type="checkbox"/> A5	C2	DE BERNIERES	Captain Corelli's Mandolin

fig.2

## Recalling Items from Individual Readers

1. Go to **Circulation Menu** then **Reader Record**.
2. Enter the reader id of the reader you want to recall from in the **Reader ID** field.
3. Click on the **Loans** tab.
4. Click on the **Recall** button.
5. Place a tick in the left hand checkbox against the item(s) you want to recall from this reader or click on **All** to select all items out on loan to them, then click on **Ok**. See *fig.3* (below).
6. You will be prompted “How would you like the letter to be produced?”. Click on either **Email** or **Printed**.

You will then be prompted that the accession has been noted for recall and that you may print recall letters from the recall menu. See **Printing Recalls** on page 4.



*fig.3*

## Recall Batches

The recall batch function is useful if you want to recall a specific group of items or recall from a specific group of readers. For example, you may want to recall all items on loan before you start a stocktake or during the run up to the end of term. Or you may want to recall all items out on loan to readers who belong to a specific reader category or whose membership is about to expire.

There are a few recall batches already set up in Heritage for you to use. Please see below for instructions on how to run one of them. Alternatively you can create your own recall batches. Please see page 108 of the Heritage 4.1.10 manual for further instructions on creating your own recall batches.

## Recalling Items on Loan to Expiring Readers

1. Go to **Circulation Menu**, **Recalls Menu** then **Define Recall Batches**.
2. Click on the drop down arrow to the right of the **Recall Group** field and select **EXPIRING**. See *fig.4* (page 4).

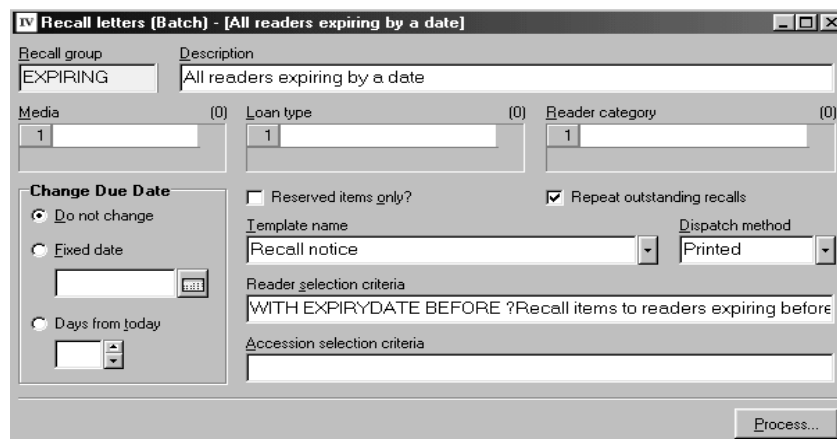


fig.4

3. Ensure that the fields of the record are filled in exactly as *fig.4* then click on the **Process** button.
4. Enter the date you want to recall items from readers with an expiry date before, then click on **Ok**.

You will then be prompted that the process has finished successfully. You now need to print the recall letters. See **Printing Recalls** below.

### Printing Recalls

1. Go to **Circulation Menu, Recalls Menu** and click on **Print Recalls**.
2. You will be prompted “Which recalls do you want to print?”. Select **Print all recalls** and then click on **Ok**.

The recall letters for the items, reader or batch of items/readers you selected will now be printed/emailed. Once the letters have been sent to the printer you will be prompted “Your letters have now been sent to the printer. Do you want to clear them from Heritage?” Click **Yes** if the letters have printed successfully, answer **No** if the letters did not print successfully or you need to reprint them.

### Recall Letter Templates

There is one recall letter template available in Heritage called **Recall Notice**. This letter template is the default template used to print recall letters. If you want to change the layout or wording of this letter template it can be edited by going to **Reports Menu, Reports Wizard** then the **Recalls** area of **Standard Reports**. You can also create a new recall letter template in the same area then select this letter template to be used on a recall batch. For example, you could create a special recall letter template for recalling all items required for a stocktake then select this letter template in the relevant recall batch. See *fig.5* (page 5).

fig.5

### Clearing the Recalls File

When you recall individual accession/catalogue records, recall from individual readers or process a recall batch, the recall letters to be printed are saved to a file called RPTRECALLS. When you then click on **Print Recalls** and select **Print all Recalls**, all the letters saved to RPTRECALLS will be printed. If you receive any error messages when trying to print recalls or you find that old recall letters are being printed when not required, it is advisable to clear the RPTRECALLS file following the steps below:

1. Go to **Reports Menu** then **Reports Wizard**.
2. Click on the **Adhoc Reports** tab then click on **New**.
3. Enter **CLEAR\_TABLE "RPTRECALLS"** in the **Command** field then press **Return**.

The RPTRECALLS file has now been cleared. You can now start recalling items again.